Sales plan

TEMPLATE

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[Insert your business logo]

[Enter your business name]

Sales plan

**Date:**  Select a date

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# Purpose

This section should describe what your sales plan is trying to achieve at a high level for your business. It is often an extension of your vision—for example:

* to be recognised as the best provider of XYZ services in the State
* to achieve lead advantage or recognised specialist status
* maintaining our market share
* achieving a specific sales revenue target
* opening a number of shops in new locations within our geographic area
* diversifying our product or service range
* expanding into new geographical locations and markets.

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# Key objectives

After identifying the purpose of your plan, you will then have ideas of what your key objectives should be. These objectives can be placed into categories that define your business. These may include:

* introducing a new product into the XYZ market that has not been released before
* developing internal capability to manufacture the new product in-house
* developing internal capacity to manage leads for
* engaging XYZ consultants to undertake market analysis for Product A sales (market development)

### Human resource development

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### Processes and systems

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### Product development

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### Market development

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# Key performance indicators

Once you have identified what the key objectives of your sales plan are, you need to know when you’ve achieved an objective. A key performance indicator will allow you to set a performance goal that indicates this achievement.

For each of the key objectives, determine 1 key performance indicator that would show you have achieved it by completing the following section. Examples may include:

* develop prototype of Product A and undertake viability testing (product development)
* recruit a machinist with experience in XYZ milling equipment (HR development)
* purchase automation software for managing client projects (processes and systems)
* engage XYZ consultants to undertake market analysis for Product A sales (market development)

### Human resource development

Key objective

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Key performance indicator

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### Processes and systems

Key objective

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Key performance indicator

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### Product development

Key objective

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Key performance indicator

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### Market development

Key objective

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Key performance indicator

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# Organisation sales action plan

You can then bring everything together into one table that is used by your staff to deliver the sales strategy. The table below could be set monthly, quarterly or annually to suit your business and sales strategy.

* **Objective**: Copy your key objectives into this area. Each objective can have several actions that make up the whole objective.
* **Target market**: This indicates the market you are trying to reach (e.g., Government, Specific Consumers, Location, Demographic).
* **Strategy**: This column describes what you will do (e.g., attend 4 conferences about process automation)
* **Tactic(s)**: This column provides the details of what you will do (e.g., Attend Expo XYZ on March)
* **Timeframe**: Insert a realistic date that you will be able to achieve the objective. Consider other organisational activities and projects.
* **Responsibility**: Make someone responsible for delivering on the objective—even if it's only yourself.
* **Measurement**: Based on the key performance indicator you identified earlier, put further substance around it. (e.g., Final copy of market analysis report to be presented to the organisation by “Date”.)

| **Objective** | **Target Market** | **Strategy** | **Tactic(s)** | **Timeframe** | **Responsibility** | **Measurement** |
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