

 ReferralRock

Sales Plan Template

1: Introduction

Use this space to briefly cover everything that will be in your sales plan. Many people find it easier to fill in this section last.

2: Sales Team Structure

Key information about your company's sales team. This can be a collage of pictures, an organizational chart, or anything to introduces your team List any relevant team hierarchy or relationships.



3: Market Position/Industry

You have a lot of freedom in this part of your sales plan. Create graphs or charts comparing market share, estimated revenues, customer growth, etc. Or write a few paragraphs to sum up your company's market position compared to competitors.

Company	Strengths	Weaknesses	Market Share
List your company in the first row, and your immediate competitors in the following rows	Enumerate any strengths of your company and its competitors	Enumerate any weaknesses of your company and its competitors	Note the estimated market share of your company and its competitors

4: Target Audience

Company	Decision Makers	Impact
List the specific companies or locations you plan to contact for sales	Identify the person your sales team needs to contact and their position	Note the impact of this client. How does this sale fit into your overall sales plan?



5: Challenges

Challenge	Why?	Plan
List challenges your sales team faces (i.e., competing products, new entries to the market)	Explain what makes this a challenge to your business	How do you plan to overcome this challenge?

6: Goals and Milestones

Goal	Why?	Metrics (KPIs)	Timeline
List your sales objectives, target metrics, and any other team goals (i.e., increase sales revenue by \$25,000)	Note what makes the goal relevant and worth achieving	How do you plan to measure progress toward each goal? Include actual data and metrics	List when you expect this goal to be met, or how often you'll measure its progress



7: Plan of Action

Objective	Plan of Action	Next Steps
List your sales team's current objectives (i.e., increase SQLs by 15%)	Explain the steps your team will take to achieve this objective	List 1–2 immediate steps to get your plan started

8: Finances

A key section in your sales plan, this is the place to list your sale's team budget, how you plan to allocate it, and other important financial numbers. You can also compare the last measurable period to this one, and note this period's financial targets.

For a full-fledged financial template, we recommend visiting Microsoft Office's template library or SmartSheet.

9: Summary

Now it's time to wrap everything up into an actionable summary. This section can be brief, only about 2–3 sentences.

