



Sales plan template



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A well-structured sales plan is essential for achieving your business goals. This template provides a comprehensive way to chart out your sales plan. The most effective sales plans are tailored to your unique company, products/services, and market.

Instructions

- 1. Fill in the blanks:** Put your company-specific information in the last column. Be detailed and specific.
- 2. Adapt and expand:** Use these sections as a starting point. Add or modify sections based on the complexity of your sales process.
- 3. Revisit regularly:** A sales plan is not a static document. Review and update it frequently to reflect market changes and performance.

Sales plan header	Element	What this means	Your company's sales plan
Executive summary	Company overview	Brief description of your company	
	Product/service description	What do you sell, and what's special about it?	
	Top strategies	Outline the core strategies driving your sales efforts	
Business overview	Mission statement	Your company's purpose and overarching goals	
	Competitor landscape	Who are your competitors, and what sets you apart from them?	
Business goals and revenue targets	Revenue target	Specific revenue goals for the sales plan period	
	Customer acquisition	How many new customers for this period?	
	Market share growth	Aim for growth within your industry or segment.	
	Other goals	Include any other goals (expansion, thought leadership, etc.)	

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Target market	Ideal customer profile	Who are the most likely buyers (industry, company size, job titles)?	
	Decision-makers	Who makes purchasing decisions in your client organizations?	
	Pain points	What problems does your product or service solve?	
Customer segmentation	Segment definitions	How do you group customers (needs, budget, tech-savviness, etc.)?	
	Segment-specific strategies	How will you personalize your messaging/approach for each segment?	
Sales strategies and tactics	Inbound marketing	Content strategy (blog, whitepapers, case studies, webinars, etc.)	
	Outbound sales	Targeted outreach (email, social media, networking)	
	Partnerships	Resellers, consultants, etc.	
	Customer success	Focus on onboarding, upsell opportunities, and retention	
Sales channels	Direct sales	Outline your sales team structure (inside sales, field sales, etc.)	
	Website	Online sales capabilities, lead generation forms, free resources	
	Other channels	Resellers, distributors, strategic partners	

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Budget	Marketing	Content creation, advertising, events, tools	
	Sales	Salaries, commissions, travel expenses	
	Technology	CRM, sales intelligence	
	Training	Onboarding new hires, ongoing sales skills development, technology training	
Roles and responsibilities	Leadership	Who sets the strategy and manages the sales team?	
	Marketing	What role does marketing play in lead generation and nurturing?	
	Account executives/ SDRs	Sales cycle management and closing deals	
	Customer success	Customer onboarding, support, retention, and upsell	
Sales forecast	Pipeline management	Goals related to value of qualified leads	
	Close rates	Expected % based on historical data or benchmarks	
	Projections	Revenue goals	



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