

Writing a Sales Plan

© Ray Brun, MBA, CPA, SPHR, (Sr.Prof.HR Mgr.)

Facilitator and Owner of The Alternative Board East Bay North chapter, www.TABeastbaynorth.com

Author of [How Small Businesses Capture Talent](#), *164 Strategies for Recruiting and Hiring Winners*

All businesses, including small and mid-size ones need a written sales plan—especially those looking to move forward or expand their company. Not only does this help keep the direction of the company in focus, it also shows all stakeholders and possible investors the sales goals and growth targets you have for your company.

Much like a business plan, in which you set direction for the entire company to follow, a sales plan is intended as a guide for your sales team. This plan will specifically outline the goals you want the sales team to achieve and create the measurements that enable you to monitor your sales team to keep them on track. A well-outlined sales plan will also hold the salesperson accountable for the results. This is a great motivational tool for the salesperson, as well as being a useful tool to review results and determine the effectiveness of efforts.

Sales plans are not only beneficial for the salesperson, but also for the other employees. From a top-level position (executive/management level), a sales plan creates awareness of what the sales team is expected to achieve for the company. It also ensures the owner/executive that the sales team is accountable to reaching specific, measurable goals for performance evaluation.

There are three major areas you need to focus on when writing your sales plan. You will need to clearly define your sales objective(s), give a clear plan of action and report and track your results.

This discussion assumes your company already has a written business plan. At TAB East Bay North, we prefer the use of a One Page Business Plan™ because it is so easy and it works well for all our members of The Alternative Board. Next, take all sales goals and sales plans from your business plan and add it to the objective section of your sales plan. The purpose of having a clear sales objective section is to ensure that your sales team clearly knows what their duties and responsibilities are for that year. Be sure to include everything you want done for the sales plan, it is better to be exact instead of vague and exclusive. Everything from internal sales, such as training a new salesperson, to external sales, such as expanding customer base, needs to be included in this section. Be sure to include an executive summary in this section. This should be a quick overview of the entire sales plan. There should also be a quarterly objectives section that outlines goals that should be met by each quarter, as well as clearly defined areas that you want to target your sales to selling in a particular territory.

A plan of action is your next section. This is where your previous objectives will be given a specific path for following-through. You want to have your plan of action be written clearly and easy to follow. Having an unrealistic action plan will only deter your sales team. Before you present your product to a prospect, make sure you know their company. Your plan must

emphasize the importance of doing research on each prospect—this is will not only impress the prospect, but they will also remember who you are afterward. The action plan should have a few different options for your sales team to use. They also should use more than one route to get a prospect. If your salesperson sends a letter, make sure they follow-up with the prospect within a week or two of them receiving the letter. Once you have the prospect interested, there should be an action plan on finalizing the sale with the prospect to make them a customer.

Your last section should be about reporting all your sales results. In this area you should have a system for your sales team to track all results. This is useful for both your company and your sales team to evaluate results and efforts. This will further help make your sales team more exact in the way they sell.

Your sales plan should be a 12-month plan that is updated and changed each year. Because the business-world changes so rapidly and trends are continuously adapting, you need to keep an up-to-date sales plan. What worked in the past will not necessarily work in the future especially when it comes to marketing and sales.

Note: Your sales plan is only as good as the talented sales people you have implementing it. Employers who utilize [Employment Assessments](#) make much better hiring decisions. [Learn how small businesses capture talent here.](#)