

# How to Create a Growth-Oriented Sales Plan



Close more deals and generate more revenue with these actionable tips and templates.



A free marketing resource from

# Inbound 281

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# Why You Need a Growth-Oriented Sales Plan

A sales plan lays out your objectives, high-level tactics, target audience, and potential obstacles. It's like a traditional business plan but focuses specifically on your sales strategy. A business plan lays out your goals -- a sales plan describes exactly how you'll make those happen.

There's no one-size-fits-all sales plan. The only wrong way to use a sales plan is to write it at the start of the year or quarter and never touch it again. You should periodically review and even update it as time goes on to ensure you're focused and on-track.

The eguides includes tips on creating a sales plan, along with examples and templates for a variety of businesses and industries.

We hope you find this information helpful. If you have any questions, feel free to reach me at 800-834-4910 or at [inbound281.com](http://inbound281.com).

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# How to Create a Sales Plan: Guide + Template



Source credit: HubSpot.com. Meredith Hart @meredithhart <https://blog.hubspot.com/marketing/marketing-plan-template-generator>

Do you have a sales plan? Entrepreneurs, sales executives, and sales managers all benefit from writing sales plans -- whether for their business, department, or team.

But, what is a sales plan exactly?

## What is a sales plan?

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Sales plans often include information about the business' target customers, revenue goals, team structure, and the strategies and resources necessary for achieving its targets.

An effective sales plan should do the following:

- Communicate your company's goals and objectives to your sales team.
- Provide strategic direction for your sales team.
- Outline roles and responsibilities for your sales team and leadership.
- Monitor your sales team's progress to organizational goals.

## Sales Plan Template

Ready to write your own plan? Use a sales plan template to get started. A typical sales plan includes the following sections:

- Target customers – Who your company aims to serve with its products and services.
- Revenue targets – How much revenue your team aims to bring in each period.
- Strategies and tactics – The specific actions your team will take to reach revenue targets.
- Pricing and promotions – Documentation of your offering's prices and any upcoming promotions that can convert customers.
- Deadlines and DRIs (Directly Responsible Individuals) – Outline any important dates for deliverables and list who is accountable for their completion.
- Team structure – Who is on your team, and what their role is.
- Resources – The tools your team uses to reach revenue targets.
- Market conditions – Pertinent information about your industry and the competitive landscape.

Now let's walk through how to write a sales plan.

# How to Write a Sales Plan

1. Mission and background
2. Team
3. Target market
4. Tools, software, and resources
5. Positioning
6. Marketing strategy
7. Prospecting strategy
8. Action plan
9. Goals
10. Budget

## *1. Mission and background*

Begin your sales plan by stating your company mission and vision statements. And write up a brief history of the business -- this will provide background information as the plan drills down into more specific details.

## *2. Team*

Next, describe who is on your team and what their roles are. Perhaps you manage five salespeople and work closely with a sales enablement professional and a sales ops specialist. If you're planning on adding headcount, include the number of employees, their job titles, and when you're planning to bring them on the team.

## *3. Target market*

Whether you're writing your first sales plan or your fifteenth, knowing your target demographic is crucial. What do your best customers look like? Do they all belong to a specific industry? Exceed a certain size? Struggle with the same challenge?

Keep in mind you might have different buyer personas for different products. For example, HubSpot salespeople might primarily sell marketing software to CMOs and sales software to sales directors.

This section of your sales plan can also change dramatically over time as your solution and strategy evolves and you find product-market fit. In the very beginning, when your product was in its infancy and your prices were low, you may have found success selling to startups. Now that the product is far more robust and you've raised the price, mid-market companies are likely a better fit. That's why it's important to consistently review and update your personas.

#### *4. Tools, software, and resources*

You should also include a description of your resources. Which [CRM software](#) do you plan on using? Do you have a budget for sales contests and incentives? This is where you'll lay out which tools your salespeople should use to succeed in their jobs (e.g., training, documentation, sales enablement tools, etc.).

#### *5. Positioning*

Now, name your competitors. Explain how your products compare, where theirs are stronger than yours, and vice versa. In addition, discuss their pricing versus yours. You should also discuss market trends. If you're a SaaS company, you should note vertical-specific software is becoming more popular. If you sell ads, mention the rise in programmatic mobile advertising. Try to predict how these changes will influence your business.

#### *6. Marketing strategy*

In this section, describe your pricing and any promotions you're planning on running. What key actions will you take to increase brand awareness and generate leads? Note the impact on sales.

Here's a mock version:

- Product A: Increasing price from \$40 to \$45 on Feb. 2 (2% reduction in monthly sales)
- Product B: Free upgrade if you refer another customer from Jan. 1-20 (20% increase in monthly sales)
- Product C: Decreasing price from \$430 to \$400 on March 1 (15% increase in monthly sales)
- Product D: No change

## 7. Prospecting strategy

How will your sales team qualify the leads that are generated by your marketing strategy? Don't forget to include the criteria prospects should meet before sales reps reach out. And identify which inbound and outbound [sales methods](#) your team will use to close more deals.

## 8. Action plan

Once you've outlined where you want to go, you must figure out how you'll get there. This section summarizes your game plan for hitting your revenue targets.

Here are a few examples:

### 1. Objective: Increase referral rates by 30% this quarter

- Run three-day referral techniques workshop
- Hold sales contest for referral sales
- Increase commission on referral sales by 5%

### 2. Objective: Acquire 20 Enterprise logos

- Identify 100 potential prospects and assign a [tiger team](#) to each
- Hold two executive-level events
- Give a bonus to the first team to win three logos

## 9. Goals

Most sales goals are revenue-based. For example, you might set a total target of \$10 million in annual recurring revenue (ARR).

Alternatively, you can set a volume goal. That could be 100 new customers or 450 sales. Make sure your objective is realistic, otherwise your entire sales plan will be largely useless.

Factor in your product's price, total addressable market (TAM), market penetration, and resources (including your sales headcount and Marketing support).

Your goal should also be closely tied to your high-level business goals; to give you an idea, if the company is trying to move upmarket, your goal might be "Acquire 20 Enterprise logos" rather than "Sell X in new business" (because the former will encourage you to solely chase deals rather than focus on the right type of customers).

Of course, you'll probably have more than one goal. Identify the most important, then rank the rest by priority.

If you have territories, assign a sub-goal to each. That will make it easier to identify over- and under-performers.

Lay out your timeline too. Having regular benchmarks ensures you'll know if you're on track, ahead, or behind in meeting your targets.

Suppose your sales goal for the first quarter of the year is selling \$30,000. Based on last year's performance, you know January and February sales are slower than March.

With that in mind, your timeline is:

- January: \$8,000
- February: \$8,000
- March: \$14,000

You should also write in the DRIs (directly responsible individuals) if applicable. For example, maybe Rep Carol's January quota is \$5,000. Rep Shane, who's still ramping, has a \$3,000 monthly quota. On a smaller team, this exercise helps people avoid replicating each other's work -- and shifting blame around if targets aren't met.

## *10. Budget*

Describe the costs associated with hitting your sales goals. That usually includes:

- Pay (salary and commission)
- Sales training
- Sales tools and resources
- Contest prizes
- Team bonding activities
- Travel costs
- Food

Compare the sales plan budget to your [sales forecast](#) for accurate budgeting.

## Strategic Sales Plan Examples

If you're in need of some more inspiration, take a look at these sales plan examples.

### HubSpot sales plan

We've created a sales plan template that outlines the key elements of a sales plan. [This template](#) will walk you through each of the steps to write a sales plan of your own.



Source: [HubSpot](#)

# Asana sales plan

If you use [Asana project management software](#), this template is for you. [Embed this template](#) where your team works and communicates to keep everyone aligned with your sales strategy.

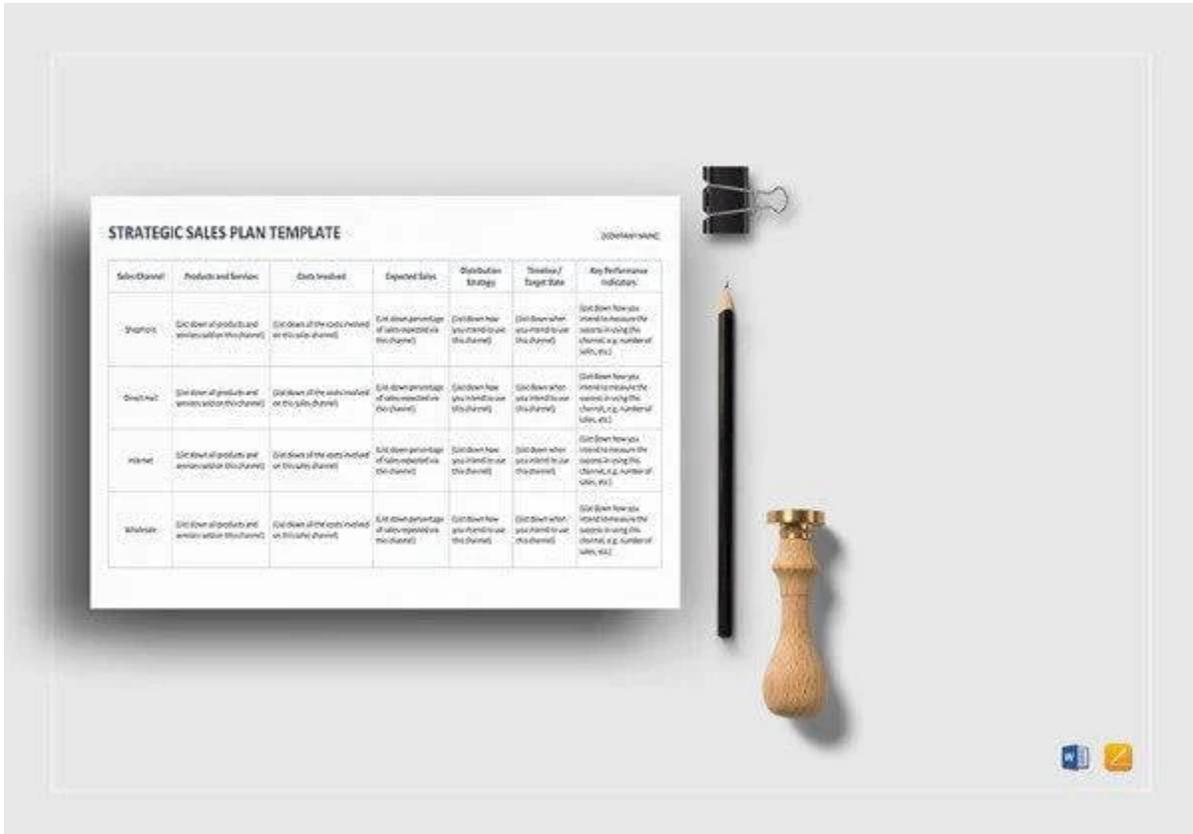
The screenshot shows an Asana project interface for 'Sales Planning'. At the top, there is a header with the project name and three user avatars. Below the header is a task list organized into three sections: 'Metrics & tools:', 'Team building:', and 'Content & training:'. Each task includes a radio button, a description, a due date, a status badge, and an assignee's avatar.

Task	Due Date	Status	Assignee
<input type="radio"/> Develop inbound and outbound sales strategy	May 31	In Prog	[Avatar]
<input type="radio"/> Set revenue targets	Apr 30	Waiting	[Avatar]
<input type="radio"/> Set pricing and promotions	May 31	In Prog	[Avatar]
<input type="radio"/> Determine target customers	Monday	In Prog	[Avatar]
<input type="radio"/> Determine sales tooling	Mar 18 – Apr 30	On Hold	[Avatar]
<b>Team building:</b>			
<input type="radio"/> Draft team mission statement	Tomorrow	In Prog	[Avatar]
<input type="radio"/> Map team structure	Apr 1	Waiting	[Avatar]
<input type="radio"/> Work with marketing on value proposition, content, and lead generation strategy	Apr 1 – 30	On Hold	[Avatar]
<b>Content &amp; training:</b>			
<input type="radio"/> Perform market research + competitive analysis	Mar 18 – 29	In Prog	[Avatar]
<input type="radio"/> Create and provide resources for customers	May 31	On Hold	[Avatar]
<input type="radio"/> Draft buyer personas	Apr 1 – 12	Not Star...	[Avatar]

Source: [Asana](#)

# 1-page sales plan

A sales plan doesn't need to be hundreds of pages long. Try [consolidating your sales plan](#) to a page or two.



Source: [BestTemplates](#)

## Small business sales plan

If you run a small business, you may not have a fully stacked sales team yet. Establish a strong sales strategy for your company that future hires can build off of with [this template](#).

Company Name

Company Address

Date of Plan Adoption

Replace all grayed-out example text with text that fits within the section based on your business.

### Mission and Objectives

#### Company Mission Statement

This is a formal statement describing what your business plans to achieve. An example of a good mission statement is: We provide customers with cutting-edge digital marketing solutions with best-in-class technical support at a profit to our shareholders.

#### Sales Objectives

The sales objectives outlined below are goals supporting the company's growth a year from now, as well as years in the future, in terms of increasing revenue, market share, or profit margin.

Enter your immediate sales objectives. Objectives should be specific, measurable, achievable, relevant, and timed. This is also known as being SMART.



Source: [FitSmallBusiness](#)

# Sales action plan

Dive into the details of your sales strategy with a [sales action plan](#).



Source: [BestTemplates](#)

## 30-60-90 day sales plan

Customize your sales plan to set goals for the [short-term](#) and [long-term](#).



Source: [Template.Net](#)

## 90 day sales plan

Look ahead at your sales strategies for the next 90 days using this [sample sales plan](#).



Source: [Template.Net](#)

# About Inbound 281



## A Growth Agency

Inbound 281 is a full-service, growth-focused digital marketing agency. We help businesses grow by improving their marketing to increase sales, revenue and profits.

We help owners, marketers and sales managers who are looking for new ideas to help sales hit their targets. Often times they are frustrated that, after all the time, efforts and money they have invested, they're still not getting the results they were expecting.

Our sights are set on lead acquisition, lead conversion, and conversion rate optimization. We specialize in multi-channel digital marketing, including content marketing, web design and development, SEO, pay per click, and social media.

## *Ready for a Conversation?*

What's your dream result? Let's get the digital marketing conversation started!

Looking for new customer acquisition, lead generation, client engagement or a competitive advantage? We're ready to learn more about your goals so we can help you build a Marketing Road Map to help you achieve your goals.

[Schedule a Conversation](#)

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