IMPACT CONSULTING

Sales Plan for **Date / /**

SALES GOALS

Priorities	Next 12 months	Year 2	Year 3
1.			
2.			
3.			

KEY METRICS

Referral Sources	Leads		Interviews		Applications		Approvals		Settlements	
	#	$	#	$	#	$	#	$	#	$

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Individual Sales Action Plan for

Date / /

Actions	Q1	Q2	Q3	Q4
1.				
2.				
3.				
4.				
5.				

KPI	Target	Result	Target	Result	Target	Result	Target	Result
Leads								
Interviews								
Applications								
Approvals								
Settlements								

Strategic Sales Plan for

Date / /

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3 Year Sales Goals	This month	This Quarter	12 months	3 years
Targeted Sales Goals - Revenue - EBIT				
Existing Business - Recurring revenue - Advanced - pipeline deals - Minus attrition rate				
Existing Clients Increase SOW - Sell new product - Sell more often - Increase price				
New Business				

Leading Activity	Weekly	Monthly	12 months	Actual
Deals required *(revenue target/average deal value)*				
Prospecting calls				
Database mining				
Referral management				

Target Market			
Target Markets	Core	Secondary	
Target Audience	Decision Maker	Influencer/Gate Keeper	End User
Problems we solve			
Value we provide			

Strategic Messaging	
	Positioning Statement *(a statement that speaks to the market)*
	UPV *(unique value proposition) (measurable outcome over time)*
	USP *(unique selling proposition) (Why should customers choose us?)*

Strategic Priorities	Who	When
1.		
2.		
3.		