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Bridging the Gap Through Effective Content

## QUICK GUIDE: 2024 YEAR-END REVIEW 2025 PLANNING TOOL

**Abstract:** The year-end review sheet evaluates key performance metrics of the past year, focusing on sales performance, customer growth, and marketing effectiveness, providing a clear view of successes and challenges. The sales plan sheet for the upcoming year outlines actionable goals, strategies for growth, and improvement areas, setting the stage for continued progress. Together, these sheets help align the team's focus and prepare for success.

Krishnan Allampallam  
[krishnan@biotechbridgemedia.com](mailto:krishnan@biotechbridgemedia.com)

## **2024 Year-End Review Sheet**

The year-end review is an essential process to reflect on the past year's sales performance, identify key achievements, and understand areas for improvement. This review assesses metrics such as revenue growth, customer retention, and market share, along with individual and team performances. Additionally, it highlights lessons learned and the challenges faced, providing a clear summary of how the sales strategies have performed relative to the goals set at the beginning of the year.

Through this review, we gain a comprehensive understanding of the business's strengths and weaknesses. By analyzing financials, customer feedback, and product performance, the review offers critical insights into how well the team executed its sales objectives. These insights lay the foundation for strategic adjustments in the upcoming year, ensuring continued success and alignment with broader business goals.

## 2024 Year-End Review Planning Sheet

Section	Key Metrics/Details	Action
Sales Performance	Total Sales Revenue	Compare against sales targets set at the start of the year. Identify any major variances and reasons behind them.
	Revenue by Product Line	
	Revenue by Region	
	Number of New Accounts	
Customer Growth	Number of New Customers	Highlight key customer relationships and major account wins. Analyze customer retention and growth patterns.
	Retention Rate	
	Number of Active Customers	
	Key Customer Wins	
Sales Pipeline	Value of Current Pipeline	Compare pipeline performance against expected close rates. Identify bottlenecks or areas of improvement in deal closing.
	Percentage of Pipeline Closed	
	Deal Closure Rate	
Market Share Analysis	Changes in Market Share	Assess how your company's market share has changed over the year and highlight major competitive challenges or wins. Involve the marketing team
	Competitor Performance	
	New Entrants or Technologies Affecting Sales	
Marketing Campaigns	ROI of Key Campaigns	Review the success of major marketing campaigns and their impact on sales. Highlight any campaigns that outperformed expectations.  Involve the marketing team
	Number of MQL given to sales	
	Lead response time in days	
	Number of leads resulting in revenue (\$)	
	Closing Rate	
	Average closing period in days	
	# of leads in each phase of the sales cycle (prospect, connect, nurture, engage, close, transition).	
Sales Team Performance	Team Member Performance	Evaluate individual and team performance against targets. Mention any areas of growth or necessary improvements.
	Sales Training & Development	
	Turnover Rate	
Product Performance	Best Performing Products	Highlight products that exceeded expectations and those that need attention, either for improvement or retirement.
	Products with Declining Sales	
	Customer Feedback on Products	
Key Learnings & Challenges	Major Challenges Faced	Reflect on major challenges like supply chain issues, competition, or internal factors that influenced sales. Identify how these were addressed.
	Key Lessons Learned	
	Adaptations to Sales Strategy	
Financial Overview	Profit Margins	Provide an overview of financial performance, focusing on profitability and sales efficiency.
	Operational Costs Related to Sales	
	Cost per Sale	
Customer Feedback	NPS Score	Summarize customer satisfaction and how customer feedback was incorporated into the sales strategy.
	Key Customer Complaints or Praise	
	Actions Taken Based on Feedback	
Overall Summary	Did we meet our sales goals?	Provide a summary of the overall performance, focusing on key takeaways that will guide next year's strategy.
	What went well?	
	What didn't go well?	
	What should we improve?	

## **2025 Sales Planning Tool**

The sales plan for the upcoming year serves as a roadmap for achieving new revenue targets, expanding the customer base, and improving sales efficiency. It sets measurable goals across various areas, including product launches, market expansion, and customer acquisition, while detailing strategies for achieving these objectives. The plan also emphasizes the importance of team development, optimizing the sales process, and aligning marketing efforts to drive lead generation.

This plan helps ensure that the sales team has clear direction and is equipped with the resources needed to succeed. By focusing on both long-term growth opportunities and immediate improvements, the plan is designed to keep the team competitive in an evolving market and to capitalize on new business opportunities. It provides a structured approach to achieving sustainable growth throughout the year.

## 2025 Sales Plan Planning Sheet

Section	Goal/Action Plan	Key Metrics/Details
Revenue Targets	Total Revenue Goal	Set realistic targets based on historical performance and market conditions. Include growth targets by quarter.
	Revenue Goal by Product Line	
	Revenue Goal by Region	
Customer Acquisition	Number of New Customers Target	Define key customer acquisition strategies such as partnerships, digital marketing, or events.
	Target Industries/Segments	
	Strategies to Reach New Customers	
Sales Pipeline Goals	Total Pipeline Value Target	Establish growth targets for the pipeline and specific initiatives to improve conversion rates.
	Conversion Rate Target	
	Pipeline Growth Strategy	
Marketing Strategy	Key Campaigns for the Year	Define the marketing plan, focusing on campaigns that will drive leads and support the sales pipeline.
	New Marketing Channels	
	Budget Allocation for Digital vs. Traditional Marketing	
Product Strategy	New Products to Launch	Focus on product development, launches, and improvements. Include targets and strategies for promoting new products.
	Sales Targets for New Products	
	Enhancing Existing Products	
Sales Team Development	Hiring Needs	Plan for expanding the sales team, improving their performance, and retaining top talent through training and incentives.
	Training & Development Plans	
	Performance Review & Incentive Programs	
Market Expansion	New Regions or Markets to Enter	Identify potential new regions or markets and outline strategies for entry. Conduct competitor analysis.
	Market Research Needed	
	Competitor Analysis for New Markets	
Sales Process Improvement	Streamlining Sales Workflow	Identify process improvements, tools, or systems that can improve sales efficiency and deal closure rates.
	Adopting New Sales Tools/CRM Enhancements	
	Reducing Sales Cycle Time	
Customer Retention	Retention Rate Target	Define plans for increasing customer loyalty and ensuring key accounts are well-managed.
	Strategies for Increasing Customer Satisfaction	
	Account Management Plans	
Budget & Resource Allocation	Sales & Marketing Budget	Allocate budgets for all sales-related activities, including marketing, product launches, and team resources.
	Sales Team Budget	
	Product Development Budget	
Key Performance Indicators (KPIs)	Revenue Growth	Establish KPIs to measure success throughout the year. Track these metrics quarterly to ensure alignment with the plan.
	Customer Acquisition	
	Lead Conversion Rate	
	Profit Margin	
Risk Management	Potential Risks	Identify key risks such as market downturns, competitor actions, or product issues, and outline mitigation strategies.
	Mitigation Plans	
Quarterly Milestones	Q1 Focus	Set key milestones and objectives for each quarter to ensure consistent progress throughout the year.
	Q2 Focus	
	Q3 Focus	
	Q4 Focus	

## **Biotech Bridge Media**

Biotech Bridge Media offers a **comprehensive service package** by integrating business consulting, regulatory, and quality management expertise. In collaboration with **Dr. Srilekha Deka (Script Molecular)** and **Dr. Jaspreet Seth, QuRA Solutions**, we provide end-to-end solutions, including new product development, regulatory compliance, quality management, and market strategy. Whether you're navigating FDA regulations, implementing ISO standards, or launching a new diagnostic assay, our combined team ensures seamless integration of business, regulatory, and quality frameworks.

**Krishnan Allampallam, PhD, MBA**, Founder/Owner Biotech Bridge Media,

I started BBM with the goal of helping very busy leaders with ad-hoc small projects they want to do but don't have the resources nor do they have the time to coach a new member. With 25+ years of experience in the biotech industry with a strong technical and business background, I can start on day one running. I can help with the following strategic product management, market research in biotechnology, pharma market space, content development for multi-channel digital marketing branding, product launch planning and execution, sale enablement, sales collaterals, training, technical training

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**Srileka Deka, MD, PhD**, Chief Scientific Officer at Script Molecular, Regulatory Consultant

Srileka, an experienced healthcare executive and a highly skilled scientist with two decades of experience in the biotechnology and molecular device industry. Having worked with small start-ups as well as large companies like Roche, Srilekha has multiple successful submissions to FDA [510(k)] and other regulatory agencies. She led the teams through successful ISO13485 certification and rapid launch of RUO assays. With a rich background of clinical medicine and scientific research, she is enthusiastic about leveraging her knowledge for advancement of diagnostics for improved treatment and disease outcomes in patients.

**Jaspreet Seth, PhD**, President, QuRA Solutions, QMS Consultant

Jaspreet, a dynamic professional with proven experience (20 yrs) in Quality Systems Regulations, Clinical Research Compliance, College of American Pathologists (CAP) accreditation, Good Clinical Laboratory Practices (GCLP), Quality Assurance, Quality Control, assay and process validations, and customer support experience.

Call us for a 30-minute consultancy at (773) 456 2126 or email to [krishnan@biotechbridgemedia.com](mailto:krishnan@biotechbridgemedia.com)