

Sales Plan Template

A sales plan defines and documents the analysis and objectives that inform your organisation's sales activities. document that should be reviewed and adapted to meet changing circumstances.

A key purpose of the template is to encourage you to analyse your current situation and match this analysis with your sales goals. will help ensure that the major sales activities are included in your sales plan.

Previous Period	
Revenue	Exactly how much you generated. Don't forget credit notes, bad debts and deferred payments
Unit sales by product type	Which products sell best? Are they continuing to grow?
No of customers	Does the 80:20 rule apply? How reliant are you on a small number of customers?
Average order value	Is this changing?
Geographic breakdown	A breakdown by sales territory. Which territories generate most/least?
Revenue by month/quarter	Are there trends, when are the weak strong periods
New business revenue	What proportion of business is new?
Renewal and existing business	What is your retention/renewal rate? Is this increasing/decreasing? How much "churn"