



Your Marketing & Sales Strategy Plan

TOP 3-5 OVERALL PRIORITIES	12 MONTH SALES GOALS		CORE ACTIVITY METRICS - LAPS
1. 2. 3. 4. 5.	# of new core product sales:		Breakdown Your Monthly Goals: 1. LEADS = 2. APPOINTMENTS = 3. PRESENTATIONS = 4. SALES = Other Monthly Goals:
	Avg order size:		
	# of projects/other:		
	Avg order size:		
	<u>Additional Comments</u> 7 x Lead Sources <ul style="list-style-type: none"> ● Inbound Leads – Website, Social Media ● Target Leads – Using sector specific lists and ABM campaign for outreach. ● Adviser Leads – Referrals from advisers. ● Referral Leads – Generate “Good Fit” Partner Referrals from key partners. ● Ghosted Leads – People who are visiting the website and accessing services regularly but not engaged with you. ● Event Leads– Target event attendees. ● Closed / Lost Lead – Follow up 		

		30-90 DAY MILESTONES & QUICK WINS
	APPROACH	
WHO WE SELL TO	<u>What we'll do</u>	
Ideal Buyer Profile 3 x Buyer Personas <ul style="list-style-type: none"> 1. Owner 2. Marketing 3. Sales 		
SALES TEAM AND ROLES	<u>How we'll do it</u>	

STRATEGIC <-----> TACTICAL

Your Action Plan – Tasks & Timeframes

#	PRIORITY ACTIONS	DATE/TIMEFRAME
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

Go Be Remarkable Power Tip – Prioritise these 15 actions by impact and assign responsibilities across your team with milestones.

SALES STRATEGY - SUPPORTING NOTES:

Use these supporting notes to understand each of the boxes above and complete them in detail. Take your time to complete every box with as much detail as possible.

YOUR TOP 3-5 OVERALL PRIORITIES

In this box, list your top overall business priorities for the next 6-12 months. Include growth goals, but also list other top priorities. Examples include:

- Overall growth goals – be specific with revenue and number of customers required (such as we want 10 new clients by the end of the year).
- Profit Goals – Be specific about improving profitability (such as we want our average order value to increase by £500 and our Cost of Acquisition to reduce by £20).
- Product Goals – Detail out any new products, solutions or services you plan to offer.
- Organisational goals (like hiring an extra salesperson or account manager).
- Partnering goals (for example, partnering with a local chamber of commerce).
- Targeting goals (let's say a financial target – billing £50K/month by March).
- Achievement Goals – We want to win the “.....of the year” award, or be featured in “xxx magazine”

These overall priorities help set the context for the rest of the sales plan.

WHO YOU SELL TO

In this box, list who your business sells to.

Identify both;

- your Target Buyer Persona (TBP) (the individual you want to sell to, such as Owner Owen, Marketing Mel, Sales Sam)
- your Ideal Customer Profile (ICP) (the type of company you're targeting, for example Lincolnshire manufacturing businesses)

Do your best, but don't let the lack of a laser-focused persona or ideal buyer profile deter you from putting together the rest of your sales plan. Start with something here, but also recognise that you are going to rework and sharpen it over time.

YOUR MARKETING & SALES TEAM AND ROLES

In this box, list the individuals in your business who are directly or indirectly responsible for marketing and sales. Also, list their roles.

Role descriptions differ slightly from business to business but here are some common agency marketing and sales roles.

- Marketing Executive – responsible for creating content, social posting and low level running of marketing campaigns.
- Marketing Manager / Director – responsible for setting up of more complex marketing initiatives, campaigns and measuring results to optimise results.
- Events & PR Manager – Responsible for setting up and running virtual and live events, both online and offline plus driving media opportunities.
- Sales Representative, principally responsible for new sales.
- Sales Development Representative (SDR) focused on generating and qualifying new opportunities.
- Director of Sales, responsible for directing, managing, and assisting the sales team. Helps to develop sales strategy, price, or close deals.
- [Other Stakeholder]

In a smaller business, it's likely that one individual, such as the owner, will fill all or more than one of these roles at once. At a medium or larger organisation, it is common that each role might have a dedicated individual.

YOUR 12 MONTH SALES GOALS

In this box, list your 12-month sales goals.

Use each of the available categories:

- The number of core product / service sales (for example, 15 retainers)
- The average sale size (for example, £5500/month)
- The number of projects and any other non-core work (for example, 10 projects)
- The average size of projects and any other non-core work (for example, £3000)

One common question on goal setting is “Should my goals be ‘moonshots’ or more ‘realistic’?” Both approaches have value, but your marketing and sales plan is meant to be highly tactical and actionable. So keep it focused on realistic goals that’ll make you stretch, but that are realistically achievable with hard work and effort.

APPROACH

In this box, list your approach to reaching your marketing and sales goals.

In the top half of the 'Approach' box, describe a few specific areas on which you'll focus. These could be areas like target selling, lead generation, speaking, improving your sales process, sales hiring, sales training, or other areas. Don't include too many areas or else you'll lose focus. We recommend focusing on the top area or two.

Once you've identified on which areas to focus, use the bottom half of the 'Approach' box to describe *how* you'll plan on improving these areas.

CORE ACTIVITY METRICS

In this box, list the key activity metrics that will help you reach your goals. Start from your goals and work backwards. Funnel metrics vary from business to business depending on your market, resources, and tactics, but here are some baseline estimates to start you out.

To produce 1 core product deal, it is typical to have:

- Targeted at least 40 leads
- Run 10-12 exploratory Calls
- Run 4 goal setting and planning Calls
- Run 2 final presentations

Tailor these figures for your business and then use them to determine your required activity per month. For example, if your aim is one core product sale per month, you'd have to achieve each of the example measures above monthly. If your aim is two core product sales monthly, you'd have to achieve twice these measures monthly. If your goal is one core product sale every two months, you'd halve the effort.

It is best to know all your funnel metrics, but it's important to highlight a couple on your sales plan to help you focus. We recommend focusing on the number of exploratory calls you set each week or month and the number of final presentations you give each month.

Also consider adding other key metrics in this box that are relevant. For instance, if your approach relies heavily on live events or public speaking, set a target number of speaking engagements per month or quarter. If networking is a big part of your approach, set a target for the number of networking events attended.

30-90 DAY MILESTONES & QUICK WINS

In this box, list milestones and quick wins you'll achieve within a 30-90 period of time on your way to your annual goals.

It's important be specific and time-bound. What exactly will you achieve and by when will you do it?