# Sales Plan Template

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|---|---|
| **Business** | Northbank Garden Parts |
| **Owner** | Maya Chen |
| **Period** | 4 November 2026 to 26 January 2027, 12 weeks |
| **First review** | 18 November |

Maya and sales coordinator Owen review the account and order plan together.

## Protect repeat trade and test local stockists

**Existing accounts.** Serve existing landscape-maintenance accounts that need dependable replacement fittings and repair kits. Use agreed account contact and clear reorder information.

**Local stockists.** Add four suitable independent garden shops in the current delivery area through a small stockist introduction.

**Why these routes.** Existing account order history and local shop enquiries justify investigation; they do not prove the new-stockist target will be met.

### The offer and the customer's alternatives

A focused range of compatible replacement fittings, stock availability, a clear trade price list and dependable dispatch dates. Contractors can replenish familiar parts; shops can test a limited starter range with usable product information.

**Alternative and price basis.** Customers can use a national wholesaler or their current supplier. We compete on a relevant range and reliable information, not a claim to be cheapest. Prices follow the current net trade list.

### Outside this plan

No national chain tenders, new distant territories, broad discount campaign or unsupported next-day promise. The small team cannot support their volume, pricing and service demands this period. Reconsider a larger route only after stock, freight economics and account support are understood.

**What must hold.** Target AUD 64,000 net sales while keeping delivery commitments realistic. The target depends on the account, stock and dispatch assumptions below. Maya will review the first evidence on 18 November before extending the approach.

**Ledger basis.** The fictional prior 12-week sales ledger totals AUD 60,000: AUD 56,000 standard repeat-range sales and AUD 4,000 one-off clearance that will not repeat. The account schedule indicates AUD 4,000 lost business and AUD 4,000 lower purchasing in the next period. Those reductions are included in the target, not ignored.

# Targets and sales basis

The AUD 64,000 target requires AUD 16,000 of additional sales, not just AUD 4,000 of growth.

**Target bridge · AUD excluding GST**

| Continuing base | | Additional sales required | | Period target |
|---|---|---|---|---|
| 48,000 | + | **16,000** | = | **64,000** |

Start with the prior AUD 60,000, remove AUD 4,000 non-repeat clearance, AUD 4,000 lost business and AUD 4,000 lower purchasing: AUD 48,000 remains.

These are planning assumptions, not a forecast or cash receipts.

### Currency tax and timing

AUD excluding GST. Count invoiced goods dispatched from 4 November to 26 January, net of discounts, returns and credit notes attributable to this period. Apply the same definition to targets and actuals. This is a sales-management basis, not an assumption that orders are immediately dispatched or paid.

### Sales targets

| Sales stream | Target method | Net sales target | Evidence and assumptions |
|---|---|---|---|
| Existing accounts<br>Standard repeat range | Direct revenue | AUD 48,000 | AUD 56,000 comparable standard-range sales less AUD 4,000 lost business and AUD 4,000 lower purchasing. Confirm account by account. |
| Existing accounts<br>Additional range | Direct revenue | AUD 8,000 | Incremental products for accounts active at the start. Excludes their standard-range sales above. Customer interest is not an accepted order. |
| New stockists<br>First orders | 4 orders at net AUD 1,500 | AUD 6,000 | Four suitable shops are the target, not contracted distribution. Use a limited starter range and check delivery dates. |
| New stockists<br>Further period orders | Direct revenue | AUD 2,000 | Include their follow-on sales within these 12 weeks here, not in existing-account rows. Reorder timing remains uncertain. |

### Total and what is already accepted

**AUD 64,000 target. AUD 18,000 accepted orders** with confirmed dispatch dates are already part of the account schedule; do not add them again. **AUD 46,000 remains uncommitted target.** The target is not a probability-weighted forecast or a cash collection promise.

### Uncertainty and changes to test

Maya verifies the AUD 8,000 loss/contraction allowance by 6 November. Owen checks whether the additional range solves a real replenishment need before proposing it. If stockists cannot sell the starter range or repeat within the period, reduce or move their target rather than relabel an order as revenue. Transfer the actual delivery and payment timing to the business budget and cash forecast.

# Routes and practical sales approach

## Chosen approaches

### Existing contractors

Agreed account contact

**Offer and next buyer action.** Send a useful availability and price sheet through the agreed contact route. Ask the customer to confirm its actual replenishment need and timing.

**Who sells and supports.** Owen maintains the account list and follows up agreed next actions. Maya handles exceptions; warehouse lead Sam confirms stock.

**Limits and review.** No automatic bulk marketing sequence. Record reduced demand or a poor fit. Review the account schedule each fortnight.

### Existing accounts

Relevant additional range

**Offer and next buyer action.** Show the fitting or kit only where it solves an identified need. Let the buyer compare its present alternative and request a suitable order.

**Who sells and supports.** Owen uses a simple compatibility and product-information sheet. Sam checks that the required items can be supplied.

**Limits and review.** No extra item merely to increase basket size. Keep incremental sales separate from the base and correct unsuitable recommendations.

### New local stockists

Selected introductions

**Offer and next buyer action.** Discuss customer fit, current range and shelf capacity. Offer a limited paid starter order with agreed stock, price and product information.

**Who sells and supports.** Maya selects suitable shops and agrees the commercial arrangement. Owen supplies ordering information and follows the first order.

**Limits and review.** No assumed exclusivity, resale commitment or commission. Confirm who orders, pays, receives and supports customers before accepting work.

## Materials tools and responsibilities

Use the existing account sheet and order system, not a new CRM project. The price sheet shows product fit, pack size, availability, freight basis and ordering contact. Owen records the customer's requested items, timing, agreed next action and owner. Sam accepts an order for scheduling only after stock and the dispatch promise are confirmed. Questions and lost-order reasons return to Maya's marketing and range review.

### For other sales models

A retailer could plan orders, category mix, useful repeat purchases and stock rather than named sales opportunities. An owner-managed service could plan referrals, bookings and available job hours. For a complex B2B opportunity, use the separate B2B Sales Playbook for discovery and proposal depth; this period plan sets the wider focus.

# People capacity and resources

### People and support

Across the 12 weeks, Maya reserves **72 hours** for selected-account work and decisions; Owen reserves **96 hours** for account contact, order support and records. These are available hours after leave and other duties, not total staff hours or salary estimates. Sam owns the warehouse schedule and product availability. Maya briefs Owen on the new range before customer contact.

### Fulfilment and stock limits

The manual account/order schedule estimates **134 dispatches** during the period against **160 workable dispatch slots** after leave and normal duties, leaving **26 slots**. The **45 dispatches already committed** are included in the 134, not subtracted again. The revenue target alone does not establish this order count. Two fast-moving fittings have a **three-week replenishment lead time**. Sam checks the dated stock schedule weekly; an available dispatch slot does not mean every item is in stock.

### Pricing discounts and payment terms

Owen uses the current net trade price list and cannot offer a discount or free freight. Maya considers exceptions only after checking product cost, freight and the customer's reason. Existing accounts retain their agreed terms. New starter orders are paid before dispatch unless Maya approves credit through the business's normal process. No open-ended supply or service commitment is included.

### Additional resources for this plan

| Resource | Cash allowance | Owner and treatment |
|---|---|---|
| Sample parts and selected stockist visits | AUD 1,200 | Maya. Incremental external spend, excluding GST. |
| Price and product-information update | AUD 450 | Owen coordinates the external layout update. |
| Selling and account support time | Tracked separately | 168 team hours above. No invented hourly cost or salary included in the cash total. |

### Budget connection and response to a shortfall

The fictional owner allocates **AUD 1,650 incremental cash** in the business budget. Ordinary stock procurement, warehouse wages and freight remain in that budget; AUD 1,650 is **not total selling or operating cost**. It does not establish profit or ROI. If stock or fulfilment cannot support an order, agree a later date, narrower range or changed target before acceptance.

# Actions customer value and review

### First actions

| Action and useful output | Owner | Due | Dependency and review |
|---|---|---|---|
| Verify the base, losses, lower demand and additional-range assumptions in the dated account schedule. | Maya | 6 Nov | Use the ledger and customer information. Revise targets if the allowance is wrong. |
| Confirm stock, replenishment dates and dispatch slots before making promises. | Sam | 6 Nov | Include accepted orders once. Recheck stock weekly and flag an unfulfillable promise. |
| Finish the price, fit and ordering sheet. Brief Owen on the range. | Owen | 11 Nov | Maya confirms terms; Sam confirms stock. Use the AUD 450 layout allowance. |
| Discuss fit with selected shops, record needs and agree any first order and follow-up. | Maya | 18 Nov | Use the sample/visit allowance. Review learning before committing the full stockist target. |

### First value repeat business and concerns

Owen checks the first stockist delivery arrived as agreed and that the shop can identify and order the parts correctly. Record any incorrect fit, shortage or unclear information and assign its correction. Agree whether and when a replenishment conversation is useful. Do not sell additional stock to hide poor sell-through or an unresolved issue.

### Measures and decisions

| Measure and target | Source and owner | Review and response |
|---|---|---|
| Net period sales<br>AUD 64,000 | Invoice/dispatch ledger, net of credits and returns. Owen. | Fortnightly from 18 Nov. Compare dated actuals with the order schedule, not the whole-period target alone. |
| Existing standard-range sales<br>AUD 48,000 | Existing-at-start account schedule and the same ledger. Maya. | Inspect customer reasons for loss/contraction. Change the offer, service or target where justified. |
| Dispatch promises at risk<br>Resolve before commitment | Dated stock and dispatch schedule. Sam. | Weekly. Agree a revised date or range before an unsupported order. Feed recurring issues into the operating plan. |

### Review record

**Forward plan as at 4 November; no results claimed.** On 18 November, Maya records dated actuals, the order schedule and stockist learning, decides what to keep, change or stop, and sets the next owner and review.

Fictional illustration. The business, records, prices, agreements and targets are invented to demonstrate the method. No sales result, Navigate client, market benchmark or current service offer is claimed.