Sales Plan Template

Choose your sales focus, set realistic targets and turn them into work your team can deliver.

Use this plan for your business, team or client over a chosen period. Write in the answer spaces and add rows where needed. In Word, expand your answers and remove unused blank lines as the text grows. The optional Excel companion calculates targets and compares net sales; this Word plan works on its own.

Commercial goal and focus

Start with the business decision. Identify the customers and offers worth attention, and what you will leave out.

Business and planning period

Name the business, plan owner, start and end dates, and the first review.

Goal and starting position

What change matters? Record comparable prior sales and their source. Remove one-off work and allow for losses or lower purchasing to show the continuing base before adding growth. If there is no history, state the basis to check.

Chosen customers and routes

Who will buy, in what situation and through which routes? What supports the choice?

Offer and reasons to choose us

State the useful offer, buying criteria, alternatives and credible difference. Include the relevant price or terms basis.

What we will not pursue

What customers, products, territories or tactics are outside this plan, and why? What would justify reconsidering it?

Targets and sales basis

Use direct net revenue where it is the sensible planning unit, or meaningful quantities multiplied by net value. Keep the streams separate so each sale appears once.

Currency tax and timing

Define what counts as a sale, its period and tax treatment. Keep bookings, revenue and collections separate. Include any adjustments.

Sales targets

Sales stream	Target method	Net sales target	Evidence and assumptions

Total and what is already accepted

Total the non-overlapping targets. Identify accepted orders within that total, their delivery timing, and the part still to win.

Uncertainty and changes to test

Which loss, contraction, return, price, timing or new-customer assumptions could materially change the target? Name who will check, when, and the alternative if it is wrong.

Routes and practical sales approach

Choose how buying will work. Use a route that suits the customer rather than prescribing calls, a sales-rep funnel or every available channel.

Chosen approaches

Customer and route	Offer and next buyer action	Who sells and supports	Limits and review

Materials tools and responsibilities

What makes the approach usable? Define who responds, what information travels and how the next person accepts it.

Adapting the route

How does this plan fit the way your customers buy? Name any different approach needed. If no additional route is needed, say why.

People capacity and resources

Check both selling and fulfilment before making promises. Use the same period and units when comparing demand with capacity.

People and support

Who owns sales and delivery? Allow for leave, other work, skills and support. Record available time.

Fulfilment and stock limits

What can you actually supply? Sum the work required by the plan and compare it with available capacity in matching units and dates. Include existing commitments once, along with stock, lead time, preparation and service constraints. Record the response to any constraint.

Pricing discounts and payment terms

Who can agree an exception? State the price, freight, scope and payment limits that keep the sale worthwhile.

Additional resources for this plan

Resource	Cash allowance	Owner and treatment

Budget connection and response to a shortfall

What funding or capacity is confirmed? Decide what changes if the plan does not fit. Identify costs held elsewhere and any escalation.

Actions customer value and review

Leave with useful work someone will own. Review what happened and change the plan where the evidence calls for it.

First actions

Action and useful output	Owner	Due	Dependency and review

First value repeat business and concerns

What should happen after the sale? Who checks delivery, useful use, an issue, reorder or renewal without forcing another purchase? Name the owner and timing.

Measures and decisions

Measure and target	Source and owner	Review and response

Review record

Record actuals and their cutoff, what you learned, the decision, and the next owner and date.