|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Seller Name |  | | | Manager/Coach Name | |  | | |
| Plan Date Range | |  | Date Finalized | |  | | Last Updated |  |

|  |  |
| --- | --- |
| **Sales Target for Period Between <DATE> and <DATE>** | |
| **Quota**  *The quota, or the sales target expected by your organization* | **Stretch Target**  *The sales target you are seeking to achieve, probably above the company-set quota* |
| <Type here> | <Type here> |

**Background**

|  |  |  |
| --- | --- | --- |
| **Sales Results Last Year**  *Fill in as applicable* | | |
| **Total Quota** | **Actual Revenue** | **% of Target Achieved**[[1]](#footnote-2) |
| <Type here> | <Type here> | <Type here> |

|  |  |  |  |
| --- | --- | --- | --- |
| **Breakdown by Category**  *Fill in as appropriate* | | | |
| **Existing Accounts** | **New Business Inbound** | **New Business Outbound** | **Referral/Other** |
| <Type here> | <Type here> | <Type here> | <Type here> |

*Note: To add more rows in this and other tables in this document, place your cursor in the bottom right box and hit the Tab key.*

|  |  |
| --- | --- |
| **Revenue Breakdown by Offering Type**  *Fill in if reviewing your revenue by offering area (products, services, solutions) is helpful* | |
| **Offering Type** | **Revenue** |
| <Type here> | <Type here> |
| <Type here> | <Type here> |
| <Type here> | <Type here> |
| <Type here> | <Type here> |
| <Type here> | <Type here> |

| **Revenue by Company**  *(Sorted High to Low)* | | |
| --- | --- | --- |
| **Company** | **Revenue** | **% of Total Revenue** |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> |
| **Total** | **<Type here>** | **<Type here>** |

*Note: If revenue comes from many (e.g., hundreds of accounts), categorize revenue as appropriate or skip this section. To add additional rows in this and other tables in this document, place your cursor in the bottom right box and hit the Tab key.*

|  |
| --- |
| **Top 3–5 Factors That Led to Last Year’s Results** |
| **What led to success?**   * <Type here>   **What held back success?**   * <Type here>   **Other considerations for next year**   * <Type here> |

|  |
| --- |
| **Current Year Plan** |
| **Targets**   * *Quota:* <Type the sales target expected by your organization here> * *Stretch or personal target:* <Type the sales target you are seeking to achieve, probably above company-set quota, here>   **Current Weighted Average Pipeline**[[2]](#footnote-3)   * <Type here> |

**Plan to Achieve Overall Target**

|  |  |  |  |
| --- | --- | --- | --- |
| **Summary Source of Plan-Year Business** | | | |
| **Accounts / Repeat** | **New Business Inbound** | **New Business Outbound** | **Referral/Other** |
| $ | $ | $ | $ |

|  |  |  |  |
| --- | --- | --- | --- |
| **Accounts** | | | |
| **Account** | **Current Revenue** | **Plan-Year Revenue** | **Increase/Decrease** |
| <Type here> | <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> | <Type here> |
| <Type here> | <Type here> | <Type here> | <Type here> |

|  |  |
| --- | --- |
| **New Business Inbound** | |
| **# of leads needed** | <Type here> |
| **# of proposals/quotes** | <Type here> |
| **# of wins** | <Type here> |
| **Average size sale** | <Type here> |
| **Total revenue** | <Type here> |

|  |  |
| --- | --- |
| **New Business Outbound** | |
| **# of leads needed** | <Type here> |
| **# of proposals/quotes** | <Type here> |
| **# of wins** | <Type here> |
| **Average size sale** | <Type here> |
| **Total revenue** | <Type here> |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Referral/Other** | | |  | **Revenue Type (Offerings Sold)** | |
| **# of wins** | | <Type here> |  | **Offering Type** (Products/Services) | **Revenue in Plan Year** |
| **Average size sale** | | <Type here> |  | <Type here> | <Type here> |
| **Total revenue** | | <Type here> |  | <Type here> | <Type here> |
|  |  | |  | <Type here> | <Type here> |
|  |  | |  | <Type here> | <Type here> |

**Targeting**

My territory includes the following:

|  |  |
| --- | --- |
| **Existing Accounts** | <Type description here> |
| **Target Accounts** | <Type description here> |
| **Geographies** | <Type description here> |
| **Industries** | <Type description here> |
| **Audience Segments** | <Type description here> |
| **Other** | <Type description here> |

**Metrics**

|  |  |  |
| --- | --- | --- |
| **Lead Indicators – Pipeline Metrics**  *Enter the metrics that might point to your success in achieving your goals.  (Add as many bullets as you need to reflect the metrics you’re tracking.)* |  | **Examples of Lead Indicators**  *Choose from this list, or use your own* |
| * **<Type here>:** * **<Type here>:** * **<Type here>:** |  | * Conversations initiated * Meetings booked/attended​ * Number of opportunities created * Value of opportunities created * Proposals submitted * Number of new quotes​ * Stage duration * Account satisfaction rate * Email open rate/response rate * Product/service usage |
|  |
|  |
|  |
|  |
|  |  |  |
| **Lag Indicators – Pipeline Metrics**  *Enter the metrics that might indicate a need to adjust your strategy.  (Add as many bullets as you need to reflect the metrics you’re tracking.)* |  | **Examples of Lag Indicators**  *Choose from this list, or use your own* |
| * **<Type here>:** * **<Type here>:** * **<Type here>:** |  | * Contracts signed​ * Monthly revenue​ * New clients won​ * Win rate * Client churn rate​ * Gross margin * Revenue bookings * Quota attainment * Average deal size |
|  |
|  |
|  |

|  |  |  |
| --- | --- | --- |
| **Targets by Quarter** | | |
| **Quarter** | **Sales Target**  *Indicate the target for sales won you have for each quarter* | **Sales Actual**  *Track actual sales per quarter here after each quarter ends* |
| **Q1** | <Type here> | <Type here> |
| **Q2** | <Type here> | <Type here> |
| **Q3** | <Type here> | <Type here> |
| **Q4** | <Type here> | <Type here> |

|  |  |
| --- | --- |
| **Metrics Review** | |
| **Results Review Meeting Rhythm** | Click to select rhythm. |
| **Review Team (names)** | <Type here> |

**Plan Confidence and Commentary**

|  |  |
| --- | --- |
| **Top 3–5 Reasons I Believe This Plan Is Achievable** | |
| **#** | **Reason I Believe It’s Achievable** |
| **1** | <Type here> |
| **2** | <Type here> |
| **3** | <Type here> |

|  |  |
| --- | --- |
| **Top 3–5 Priorities to Achieve Plan** | |
| **Priority** | **Action/Commitment** |
| <Type here> | <Type here> |
| <Type here> | <Type here> |
| <Type here> | <Type here> |

|  |  |
| --- | --- |
| **Top 3–5 Areas for Learning or Improving to Achieve Plan** *Knowledge, skills, and/or attributes; use of tools, technology, resources* | |
| **Areas to Improve** | **Action/Commitment** |
| <Type here> | <Type here> |
| <Type here> | <Type here> |
| <Type here> | <Type here> |

|  |  |
| --- | --- |
| **Top 3–5 Potential Results Derailers**  *Indicate top risks that can derail success, and what you can do to mitigate* | |
| **Potential Results Derailer** | **Plan to Mitigate** |
| <Type here> | <Type here> |
| <Type here> | <Type here> |
| <Type here> | <Type here> |

**Commitment to Success**

I believe I can achieve this plan and am committed to executing it.

|  |  |
| --- | --- |
| Signature |  |

1. Divide *Actual Revenue* by *Total Quota* (e.g., if quota was $1,800,000 and actual revenue was $1,900,000, % of target achieved is 105.5%). [↑](#footnote-ref-2)
2. Weighted Average Pipeline: Based on your current pipeline and the percent likelihood of winning each opportunity, how much revenue you expect to win, in the timeframe of this plan, based on opportunities and accounts you are currently working on. [↑](#footnote-ref-3)