

# Sales Plan Checklist



Feeling stressed and under pressure needing to pull together a Sales Plan?

Have you been given a target to hit but are just unsure of how to achieve it?

Do you want to impress others that you work with and ensure you have a rock solid plan that you can present with confidence at key company meetings?

If so then I am here to help.

**I want to ensure you have EVERYTHING you need to deliver a sales plan that gets you the results you desire.**



In the checklist below, you will find a list of 20 items that you need to have in place to ensure your plan gets delivered.

Take a look at what you have in place and be honest with yourself on whether you have these items in place or whether you are short in a few areas!

And if you want to really get my honest views on whether your plan will stack up, take the test at the end of the checklist and see whether your Sales Plan will be a hit or miss!

James



## SALES PLAN CHECKLIST

### TARGET

✓ ✗

1. You have clarity on what you sell and your average order value.

2. You have a clear and specific sales target to focus on.

3. You have broken this target down into quarterly, monthly and weekly targets.

### BEST CUSTOMER

4. You know exactly the target customers you want to approach.

5. You have created a specific avatar/persona for your target customer.

6. You have written down a list of the problems and challenges that your target customer has.

### IDENTIFY

7. You know where your target customers are and which networks they are part of.

8. You have created some effective content and have digital assets to share with your target customers.

### CONTENT

9. You have created some sales resources (such as lists of questions) for your sales team to use.

10. You have prepared them to have sales conversations and have practiced how to call and handle responses.

### PREPARE

11. You have set up some inbound lead generation tools such as a quiz or lead magnet.

### ENGAGE

12. You have a clear plan over a period of weeks for your outbound prospecting using multiple media.

13. You have a clear process to follow to run the 1st call successfully.

14. You have given your team training on how to build initial rapport and make a good first impression.

15. You have a clear set of metrics and KPIs on which you are going to measure your team on.

**PERSISTENCE + VALUE**

✓ ✗

16. You have a clearly defined sales funnel and prospect journey.

17. You know the average length of your sales cycle and how long it takes to turn a prospect into a customer.

**RAPPORT**

18. You or your team knows the do's and don'ts of building initial rapport on the first call?

19. You and your team know have a clear set of questions to use in a first call?

20. You have a process to follow to run first calls and develop the relationship?

**BONUS**

21. You have implemented a strong incentive scheme that excites your team.

22. You are going to mentor and support the team with regular reviews.

23. You are going to hold regular weekly meetings (using the LION method) to ensure the plan is being delivered.

24. You will consider bringing in some external sales support (Hello 🙌👋) if you don't achieve the plans you have

# Will your Sales Plan be a Hit or a Miss?



Take our test and find out.  
[www.ineedasalesplan.com](http://www.ineedasalesplan.com)

