**2016 Sales Team Plan**

* **Overview:** *General overview of the plan. What is the reader about to experience? One or two paragraphs, don’t get excessive on this section.*
* **Current Status:** *How are you currently positioned in this market? Provide a paragraph or two, and then complete the SWOT analysis chart. Strengths and Weakness are internal descriptors in the present moment, and Opportunities and Threats should be considered external descriptors and based in the future.*

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
|  |  |
| **Opportunities** | **Threats** |
|  |  |

* **2016 Sales Initiatives:** *Up to three initiatives that your office will tackle in 2016 that will lead to greater sales. For each initiative, provide a short narrative of your plan to carry it out.*
* Increase professional development for sales people.

We will make a proactive effort to develop the professional skills of our sales people, enabling them to perform better and increase loyalty between us. We’ll spend much of Q1 planning, and will launch a plan in Q2.

* **Goals:** *Up to six sales goals, including bookings results and key performance indicators:*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Goal | Q1 | Q2 | Q3 | Q4 | 2016 |
| Bookings | $800,000 | $2,100,000 | $1,500,000 | $1,600,000 | $6,000,000 |
| RMR |  |  |  |  |  |
| Quoted $$ |  |  |  |  |  |
| # of Prospects |  |  |  |  |  |
| Etc. |  |  |  |  |  |

* **Potential Obstacles and Preparation:** *Anticipate any obstacles that could delay or harm the achievement of the goals; and state your preparation to overcome each obstacle (not too much detail – just a general statement). Try to keep this list limited to five or less items. Listed is a possible example for assistance…*
  + Potential Obstacle 1: One of our sales people quits.
    - Preparation: Build a bench of candidates.

Stay in front of the sales people and ensure relationship success.

Make this “the place to be”.

* + Potential Obstacle 2:
    - Preparation:
  + Potential Obstacle 3:
    - Preparation:
* **Creative Ideas:** *Campaigns, ideas, plans that are not part of the standard plan. This is the place to think outside the box and get creative.*
* **Targeted Accounts:** *Who are the accounts that are very important to our success?* 
  + Top Existing Accounts: *List the top 25 accounts that you must keep as happy clients and expand your business with them. These are the accounts that are your beach heads and must be protected.*
    - Strategic Approach: *In general, what mechanisms will you have in place that will ensure the top existing clients will be protected against competition?*
  + Top New Accounts: *List the top 50 accounts that are not clients yet but are on our target list to win this year.* 
    - Strategic Approach:  *In general, what mechanisms will you have in place that will maximize your probability of winning business at these top new clients?*
* **Other Targets:** *Strong players, associations, etc. – who should you know in order to succeed in the market. There may not be any for some of the sub categories listed below.*
  + Associations / Organizations
  + Construction Companies
  + A&E Firms and Consultants
  + Manufacturers

**Conclusion**

*Brief conclusion of the plan – two paragraphs at the most.*