**2016 Sales Plan - Individual**

* **2016 Sales Initiative:** *One Performance Improvement initiative that you will tackle in 2016 that will lead to greater sales. Provide a short narrative of your plan to carry it out.*
* Expand my market - identify and begin working on 150 new accounts this year.
* **Goals:** *Up to six sales goals, including bookings results and key performance indicators:*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Goal | Q1 | Q2 | Q3 | Q4 | 2016 |
| Bookings | $200,000 | $450,000 | $400,000 | $150,000 | $1,200,000 |
| 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: Lose major hospital project in Q2
    - Preparation: Dedicate 12 hours per week to prospecting for new business.

Engage management and manufacturers so I can invest time prospecting.

* + Potential Obstacle 2:
    - Preparation:
  + Potential Obstacle 3:
    - Preparation:
* **Targeted Accounts:** *Who are the accounts that are very important to the success of the office?* 
  + Top Existing Accounts: *List the top 5 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 10 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.*