Sales Strategy for [Company Name]

[Date Created]

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# Current Situation

This section serves to provide a succinct overview of the business in terms of it marketing and sales activities as well as the current market conditions, including the competitive landscape.

## Market Analysis

Add the key take outs from your market analysis. This will include a general market outlook, the demographics and size of the current market, an outline of potential target markets, who your competitors are and where they stand, and any barriers to entry.

## Marketing Plan Summary

In this section, provide a concise summary of your current marketing plan. A business’s sales and marketing functions should be aligned, therefore it is important to factor in the current marketing strategy.

## Sales History

Look at your past sales figures and activities. Take note of what worked well and what didn’t.

## SWOT Analysis

The three sections above will help you identify your strengths, weaknesses, opportunities, and threats with regard to sales activities.

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

# 

# Sales Goals and Objectives

Define specific and measurable goals and objectives.

# Target Market

Use the research and insights outlined in the market analysis and marketing strategy above to clearly define your target market. Ideally create customer archetypes or personas to help your sales representatives gain a good understanding of who the target market is, what appeals to them, what they value, what their lifestyles look like, how they consume media, and which communication channels they prefer.

# Value Proposition

A value proposition is the core message and promise of value you will be communicating.

[TIP: Sell the benefit.]

# Communication Channels

Identify which communication channels you will use to search for, engage with, and sell to customers and create a broad communication framework.

**For example:**

|  |  |
| --- | --- |
| **Channel** | **Purpose** |
| Social Media  (List the specific platforms you will use.) | Prospecting.  Creating dialog.  Building engagement. |
| Text Messages | Sending updates and alerts.  (especially time sensitive items, e.g. a flash sale) |
| Email | Ongoing, direct communication with customers .  (account queries, management, and feedback)  Providing information.  Sending press releases and newsletters. |
| Live chat | Providing instant feedback.  Engaging with customers directly and in real-time.  Driving conversion. |
| Voice calls | Following up with existing customers.  Responding to inquiries and driving conversions. |

# Action Plan

Create a plan of all actions to be performed in order to meet the sales goals and objectives as well as how these will be measured.

**For example:**

|  |  |  |
| --- | --- | --- |
| **Goal** | **Strategies/Actions** | **KPI** |
| Generate XX qualified leads per month. | Employ social selling: Create and share engaging content, monitor and react to likes, questions, and comments, encourage recommendations and endorsements.  Develop and implement a referral program. | Total number of qualified leads generated per month.  Calculate final cost per qualified to track the effectiveness and cost-efficiency of actions. |
| Increase monthly conversion rates by XX%. | Offer incentive: Testimonials and free trials.  Use live chat: Proactively help customers in the decision making process in real time.  Create urgency: Offer limited time special offers and bundles. | Conversion rate = Total monthly wins (closed deals or committed sales)/total number of prospects/leads engaged\*100% |

# Sales Tools and Resources

List the tools (e.g. software for managing relationships, email campaigns, live chat, etc.) and resources (e.g. training or onboarding materials for sales reps, product information and brochures, etc.) that you and your sales team will be using.