[](https://www.ringcentral.co.uk/)

**Add your company name here:**

**Add date:**

**Add name, job title and contact details of author:**

**COMPANY BACKGROUND**

**Add a short company history and core values:**

**DEFINE YOUR TARGET MARKET**

**Add buyer personas for all segments:**

**Exclusions from your target market:**

**Add your physical target locations. Explain why your company is nationwide or regional and what your strategy is:**

**TEAM STRUCTURE AND CAPABILITIES**

**Add the names and titles of your sales leadership team:**

**Add an explanation of your sales teams organisation/structure:**

**Add a growth strategy for the staffing of your team, identifying any gaps:**

**POSITIONING**

**Add a description of the market conditions in your industry - how is it performing?**

**Add your company’s value proposition - what benefits entice customers and what problems are solved?**

**Add the competitive advantages of your business:**

**Add your pricing strategy and describe how it was developed:**

**Add a brief competitor analysis:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of competitor** | **How does your company outperform theirs?** | **How and where do they outperform your company?** | **How can you counter competitive weaknesses?** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**WHAT RESOURCES WILL YOUR SALES TEAM USE?**

**Add details of your CRM software and how it is used in the stages of your buying cycle:**

**Add all the tools and resources at your sales team’s disposal:**

**YOUR MARKETING STRATEGY**

**Add an overview of your email marketing strategy and the key contact for this:**

**Add an overview of your content marketing strategy and the key contact for this:**

**Add your direct mail marketing strategy and the key contact for this:**

**Add your social media marketing strategy and the key contact for this:**

**YOUR PROSPECTING STRATEGY**

**Add the criteria a prospect should meet for outreach:**

**Add details of your company’s inbound marketing strategy:**

**Add details of your company’s outbound marketing strategy:**

**A REVIEW OF THE LAST QUARTER’S PERFORMANCE**

**Add numeric details and an analysis of mistakes made. Include positive actions and tactics that worked:**

**CREATE YOUR ACTION PLAN HERE:**

|  |  |  |
| --- | --- | --- |
|  | **Outline actions your sales team will take to achieve your company’s goals (add more rows to suit your individual plan)** | **Who will take ownership?** |
| **Tactic 1** |  |  |
| **Tactic 2** |  |  |
| **Tactic 3** |  |  |
| **Tactic 4** |  |  |

**DEFINE YOUR GOALS HERE:**

|  |  |
| --- | --- |
|  | **Add details of the following targets** |
| **Revenue targets** |  |
| **Number of deals closed target** |  |
| **Number of units sold** |  |
| **Any other key metrics your company is tracking** |  |

**OUTLINE YOUR BUDGET HERE:**

**Add an outline of your sales budget including salaries/commission structure, resources and expenses:**

**ADD ANY OTHER RELEVANT INFORMATION HERE:**