

SALES PLAN CHECKLIST

To develop a plan of action that can truly help you and your sales team achieve established goals, you have to ask the right questions about your sales organization, your customer's strategy, and your process. **Here are some key elements to incorporate for an effective Sales Action Plan.**

01 Know Your Customer & Define Your Value



- Define your industry positioning
- Outline your competitors
- Create your value proposition and points of differentiation
- Define your target customers/markets

02 Have Clear Tracking and Team Focus



- Hold your team accountable by creating quarterly sales goals
- Track and measure performance by implementing and actively using a Customer Relationship Management System (CRM)

03 Develop Clear Territories



- Assess your current customer list and organize based on how they like to be sold to
- Define the strengths and weaknesses of your sales team
- Assign territories according to customer needs and sales rep strengths