



BUSINESS PLAN TEMPLATE

1) Goals

Start your business plan by listing your goals – and make sure these go beyond your company's expectations.

Think, what do you want to achieve?

Bullet these goals here:

- Promotion by Q4
- Increase lead-to-customer conversion 2%
- Sustain average deal size from Q3 last year
- Specific # New Accounts Closed

2) Strategy

Once you've written down what you want to achieve, you need to think about strategy.

Think, how are you going to get there?

Clearly describe your strategy here:

In Q2 2014, focus on framing my sales conversations to sharpen my sales story. By improving my story, I'll be able to close more deals and set myself up for a promotion as a better seller by the end-of-the-year.

3) Tactics/Actions

Now it's time to focus on your action plan for achieving number one and two.

Think, what activities are you going to commit to?

Clearly describe your actions here:

- Engage in X number of new conversations
- Block off X hours of time
- Use Signals to track email communication effectiveness

4) Obstacles to Success

This is a unique section, but one that is important to think about early on.

Think, what obstacles will keep you from succeeding?

Clearly describe your obstacles here:

- Flexibility – currently have a booked 8-5 schedule of calls
- Time – with packed schedule, finding time to read and learn is limited

5) Personal/Professional Development

To round out your plan, focus on yourself too!

Think, *what are you going to do to grow in your career this year?*

Clearly describe what you plan on doing for your personal development:

- Take an improve class to become a more effective communicator
- Attend a non-sales conference to broaden my knowledge
- Read and digest one new sales book by Q4

Once completed, review this document weekly. Make any tweaks necessary along the way but do let it dictate what makes it onto your calendar and what doesn't.
