

Below are two example sales plans from two different firms.

The first, **Building Brad's**, is based on a 5 person firm that is building and growing. They were founded a little over 18 months ago by Brad and his partner Will and began as a website, seo, and social agency. Within the past 6 months they've started offering inbound as a service and are looking to expand and sell more accounts. (Jump to [Brad's](#))

The second, **Scaling Sam's**, is based on a firm that has grown from 3 people to 15 in a little less than 4 years. They've found success with inbound and web services within the manufacturing, high tech, and telecom industries. To continue their growth, they need the right people and systems in place, including for sales. (Jump to [Sam's](#))

Partner Sales Plan - BUILDING BRAD'S

TOP 3-5 OVERALL BUSINESS PRIORITIES	12 MONTH SALES GOALS		ACTIVITY METRICS THAT MATTER
- Would like to take firm to the next level -> surpass \$750K in revenues, land 2 anchor accounts, and hire a full-time account manager -Dedicate Andrea part-time to our own marketing and inbound -Diversity into more regional/larger businesses. -Adopt Growth Driven Design for website development projects	# of new retainers:	1 (or more) every quarter	-Generate 10 qualified exploratory calls per month from leads from the website, networking, and prospecting. -Attend at least one networking event per week. Have 1-2 lunches/wk with potential Centers of Influence. - 1-2 new client presentations/month -Respond to a majority of website inquiries within 15 minutes
	Avg retainer size:	\$4K/mo	
	# of project/other:	1/month	
	Avg size:	\$4K each	
	<u>Additional Comments</u> A lot of our existing client base is smaller SEO clients - not huge upsell potential unfortunately. There are a couple we think can upgrade to an inbound retainer.		30-90 DAY MILESTONES & QUICK WINS -Close Tyrell Supplies retainer in next 30 days. -Add HubSpot Marketing Free for all our legacy SEO and social accounts. Add HS CRM as well for right accounts within 60 days -Start keeping our own forecast in the HS CRM. -Have 3 upsell discussions with legacy accounts and upsell at least 1.
WHO WE SELL TO	OUR APPROACH		
Mainly local professional service companies such as engineering firms, accountants, and lawyers - and contractors such as builders and remodelers. Looking to expand to more regional and larger companies.	<u>What we'll do</u> Lead generation!! We have gotten most of business from referrals. We'll need better leads to sell bigger accounts. Will also need to do much better job networking, especially with centers of influence. We'd also like to start proactively prospecting		
SALES TEAM AND ROLES	<u>How we'll do it</u> We'll be having Andrea focus part time on our own marketing and website to drive more leads. We'll also take a more proactive approach to networking by targeting events, doing homework ahead of time and cultivating centers of influence. .		
Brad - Principal and head salesperson Will - Principal and operations - helps on proposals			

STRATEGIC <- - - - -> TACTICAL

Partner Sales Action Plan - BUILDING BRAD'S

#	ACTION	DATE/TIMEFRAME
1	Increase blogging to 2/week - high quality content	ongoing
2	Begin forecasting using the HubSpot CRM	5/31
3	Implement HubSpot Marketing Free for legacy SEO accounts	
4	-send out communication	6/21
5	-install	6/30
6	-schedule and run review appointments - identify upsell opportunity	7/31
7	Certifications	
8	-Get partner and GDD certified	7/31
9	Crank up networking and working with centers of influence	
10	- Put together networking schedule	6/15
11	- Identify potential COIs	6/15
12	- Look into vistage / EO etc	6/30
13	- Look into speaking opportunities	7/15
14		
15		

Partner Sales Plan - SCALING SAM'S

TOP 3-5 OVERALL BUSINESS PRIORITIES	12 MONTH SALES GOALS		ACTIVITY METRICS THAT MATTER
-Do more speaking at top tier industry events and land column in industry publication. Author medical marketing book this year or next. . -Grow revenues 20%+ to \$2.7M -Continue to grow AM team and nurture top tier talent. Develop standard hiring, onboarding, and operating playbooks. -Ramp up sales efforts. Pick a top 50 list and develop custom prospecting approach. Add a new sales rep at some point during the year.	# of new retainers:	10	-10 qualified opportunities generated per month from inbound + target accounts - 3 highly qualified prospective new client presentations/month - 3 tier-1 industry conference speaking gigs - 4 tier-2 gigs this year this year
	Avg retainer size:	\$7,000	
	# of projects/other:	8 website projects / yr	
	Avg size:	\$25,000	
	<u>Additional Comments</u> Our core growth will come from new retainer sales. We'd like to sell 1/month and increase our average retainer size to \$7K, although realize that may be a bit aggressive so listing # of retainers as 10 above. Have an opportunity to make a big dent upselling/expanding accounts as well.		
WHO WE SELL TO	OUR APPROACH		30-90 DAY MILESTONES & QUICK WINS
Execs at manufacturing, high tech, & telecom. Good success recently with medical manufacturing & lab equipment mfr	<u>What we'll do</u> Need to get in front of bigger and better prospects. We haven't done a great job of identifying and targeting accounts. We also need a more repeatable sales process. If we can figure that out, we will hire another rep		- Renew and expand Bolton retainer by end of month. - Put together a renewal and upsell plan for 10 key accounts - Select our 50 target accounts this month - Begin prospecting target accounts - begin reaching target metrics by day 60 - Identify potential tier 1 speaking gigs for the year
SALES TEAM AND ROLES	<u>How we'll do it</u> We are going to identify a list of top 50 accounts and monitor additional companies exhibiting at tradeshow and releasing new products. We are also going to come up with a prospecting sequence and a more documented sales process.		
Tom - Business Development Lead Brett - Chief Strategy & Sales Officer Sam - Founder -occasionally helps close			

STRATEGIC <- - - - -> TACTICAL

Partner Sales Action Plan - SCALING SAM'S

#	ACTION	DATE/TIMEFRAME
1	Identify and start selling into target accounts	
2	- Source 50 accounts	6/28
3	- Write email / voicemail scripts	7/14
4	- Begin monitoring for tradeshow exhibitors and new product announcements	7/14
5	- Review & tweak scripts -> Begin prospecting	7/21
6	Develop upselling strategy	
7	- Gameplan - Amanda to own	6/21
8	- Put together plan for one account - meet and review	7/7
9	- Schedule monthly upselling strategy meetings	7/7 begin
10	Speaking	
11	- Put together speaking target list for the year	7/31
12	- Put together submission timeline	8/15
13	- Begin networking with event organizers - past speakers	Sept
14	- Put together a speaker's page on the website, edit a speaking reel, put together rest of speaker portfolio	Sept/Oct
15		