

Sales Action Plan

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| Key Results: | Relevant Activities: | Timeline: |
| Key Initiatives/Strategy: | | Milestone 1 (Goals & Metrics): |
| | | Milestone 2 (Goals & Metrics): |
| Potential Blockers: | Key Resources/Drivers: | Milestone 3 (Goals & Metrics): |

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| Key Results: What are the key results you are targeting? <ul style="list-style-type: none"> • Basis of the goal (Revenue, Pipeline, Deals, Demos, Sign Ups) • Other KPIs (Retention, Churn, MAU, MoM, LTV, CAC, etc) • Activity/Performance (Team/Individual) | Relevant Activities: State the obvious - current activities. <ul style="list-style-type: none"> • What activities pair with the new initiatives? • What needs continued efforts? | Timeline: State how you will measure time. <ul style="list-style-type: none"> • Time (Quarter, Annual, Week) • Deadline (Project, Release) • Seasonal/Event |
| Key Initiatives/Strategy: <ul style="list-style-type: none"> • What are your main initiatives to achieve this? • What are you doing differently? Growth Strategy? <ul style="list-style-type: none"> ◦ Top Down, Bottom Up ◦ Account Based marketing ◦ Product Led Growth | Milestone 1 (Goals & Metrics): Separate your Key Results into 2-3 main milestones. For each: <ul style="list-style-type: none"> • What goals need to be achieved first? • What (metrics) and how will you measure its completion? • Is there a success or quality criteria? | Milestone 2 (Goals & Metrics): Continue for milestones 2 & 3 based on the above. |
| Potential Blockers: What are some of the obstacles you might face? <ul style="list-style-type: none"> • Product/Market readiness • Working capital • Team composition | Key Resources/Drivers: <ul style="list-style-type: none"> • What types of resources can help you succeed in your initiatives? Partnerships/Channel • Domain expertise • Analytics/Benchmarks • Technology | Milestone 3 (Goals & Metrics): Your last milestone can either be the ultimate key results or a “milestone”. Make sure you have measurable metrics involved. |

