



## How to Use This Template

Thanks for downloading HubSpot's Sales Plan Template!

This tool was built for you to outline your company's sales strategy. Included are sections common in most sales plans, as well as prompts for you to fill out your company's tactics and information. Simply erase the gray instructions under each header and replace them with what makes sense for your business.

Once complete, this plan can be shared with investors, company leadership, the sales team, or whomever you see fit.

Keep in mind, this template is designed to be completely customized by your company. If you feel there are sections included that you would rather omit, or if you think a section is missing, you are encouraged to make those changes as you see for your business.

→ [If you'd prefer to access this template within Google Drive, click here and select 'Make a copy.'](#) ←

[Click here to get started with HubSpot Sales Software for free.](#)

*[Company Logo]*

*[Company Name]*

*Sales Plan: [Period of Time, i.e. Q1 2025, FY 2025]*

*Written by: [Your Name]  
[Your Email]*

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## **Mission and Background**

*In this section, give context as to why your business exists. Cover your mission statement, vision statement, and an abridged company history for readers to understand the context of the business.*

### **Mission Statement**

*[Enter your company's mission statement]*

### **Vision Statement**

*[Enter your company's vision statement]*

### **Company History/Story**

*[Enter your company's story and/or abridged history]*

## **Team**

*Who are the leaders of your sales department, and how is the rest of the department structured?*

## **Sales Leadership**

*[Name the leaders of your sales department and their titles. Optionally, you can add a photo of the sales leaders and/or a professional bio.]*

## **Sales Team Structure**

*[Explain the organization of your sales department. You can structure this section by region, team, or hierarchy. If you have an org chart filled out, this would be the perfect place to input a copy or a screenshot of it.]*

## **New Hires**

*[How will your team grow? Explain where the gaps in your head count are and what will be done before the spots are filled.]*

## Target Market

*Talk about who your product or service is aimed towards. Identify your key prospect attributes, who should be omitted from sales efforts, and the region you target.*

## Locations Targeting

*[Identify the physical location of your target market. If you are a nationwide company, identify your strategy for which locations take precedence (if any) and what your nationwide rollout strategy is. If you are a regionally-limited company, explain why.]*

## Buyer Personas

*[Who are you targeting? Buyer personas are semi-fictional representation of your ideal customer based on market research and real data about your existing customers. Outline these ideal customer personas here, and if you're creating these personas from scratch, try using this free [Buyer Persona Generator](#).]*

## Omissions

*[Let's talk about tradeoffs. To succeed, it's just as important to know who not to target as is it to know who to target. Outline the people, businesses, and/or buyers who are unqualified to pursue as prospects and why.]*

## Tools, Software, and Resources

*Explain what resources the sales team uses to accomplish its goals. This includes [CRM software](#), documentation, customer references, and any other tools used in selling.*

### Software

*[Identify the CRM software used and how it is used in every stage of the buying cycle. If you do not have a CRM yet, try [HubSpot CRM](#) -- it's completely free! If there are any other software employed in the sales strategy, identify them and their purposes here as well.]*

### Tools and Resources

*[Identify the documentation and resources salespeople can employ to do their jobs. This may include sales enablement tools, customer case studies, suggested negotiation practices, and more. In a nutshell, if there's something in your business that can strengthen a salesperson's performance, identify it here.]*

## Positioning

*Think about your place in your industry. Anyone reading this part of the plan should know what your strengths, weaknesses, and comparisons to competing companies are.*

## Market Condition

*[Speak to the market conditions in the industry. How is your industry performing in general? It could also be beneficial to run a Porter's Five Forces Analysis with [the template in this kit.](#)]*

## Value Prop

*[In general, what benefit does your business, product, or service offer that would make someone want to become a customer? Identify the problem to which you are the solution.]*

## Competitive Advantages

*[What makes your business unique and comparatively stronger than competitors? What do you offer that no other company, product, or service does, or does as well?]*

## Pricing Strategy

*[What is your pricing strategy and how was it developed? Here is a good time to talk about best practices around discounting.]*

## Competitor Analysis

*[List your top competitors as well as the following information for each competitor:]*

- **Comparative Strength** – *What are your company's assets that this competitor does not have?*



- **Comparative Weakness** – *In what areas or attributes do your competitors outperform you?*
- **Counterpoints** – *If a comparative weakness is mentioned in sales negotiations, which counterpoints can be used to address those weaknesses?*

<b>Competitor Name</b>	<b>Comparative Strength(s)</b>	<b>Comparative Weakness(es)</b>	<b>Counterpoint(s)</b>
<b>Competitor A</b>			
<b>Competitor B</b>			
<b>Competitor C</b>			

## **Marketing Strategy**

*Provide an overview of your marketing strategy. This should not be a copy and paste of your entire marketing plan, but rather a rundown of what sales should know about brand awareness and lead generation.*

*Included below are some of the most popular forms of marketing today. If your company does not use some of these, or if you use others not included here, feel free to delete and add sections respectively.*

### **Email Marketing**

*[Briefly explain your email marketing strategy and who on the team should be consulted for questions.]*

### **Blogging and Content Marketing**

*[Briefly explain your blogging and content marketing strategy and who on the team should be consulted for questions.]*

### **Video Marketing**

*[Briefly explain your video marketing strategy and who on the team should be consulted for questions.]*

### **Event Marketing**

*[Briefly explain your industry event marketing strategy and who on the team should be consulted for questions.]*

### **Customer Marketing**

*[Briefly explain your customer marketing and referral strategy and who on the team should be consulted for questions.]*

## **Direct Mail Marketing**

*[Briefly explain your direct mail marketing strategy and who on the team should be consulted for questions.]*

## **Social Media Marketing**

*[Briefly explain your social media marketing strategy and who on the team should be consulted for questions.]*

## **Prospecting Strategy**

*What steps should sales take to qualify leads and reach out to them?*

### **Criteria for Outreach**

*[What criteria should a prospect meet before sales reaches out to them? Establish must-have attributes so salespeople only spend time working qualified contacts.]*

### **Inbound Prospecting Strategy**

*[Talk about your company's tactics for connecting with contacts on an inbound level, like following up on inbound emails, meetings at industry events, or social selling.]*

### **Outbound Prospecting Strategy**

*[Talk about your company's tactics for cold calls and emails, if applicable.]*

## **Action Plan**

*Outline the concrete actions the sales team will take in order to achieve the company's goals. How many calls should be made, how many locations will be dropped in on, how many high-profile clients will be worked, etc.*

### **Tactic #1**

*[Explain the first tactic and copy/paste this section as needed for more tactics in your action plan.]*

## Goals

*What are your sales targets? These goals are contingent on how often you plan to update your sales plan.*

### Revenue Targets

*[What is your targeted revenue – booked and live – for the end of the period?]*

### Deal Target

*[How many deals do you intend to close by the end of the period?]*

### Units Sold Target

*[If applicable, how many units do you want sold by the end of this period? If your business sells multiple products, specify your target for each product line.]*

### Other Key Sales Metric(s) Target

*[If you have any other metrics you are tracking for sales (software MRR, customer retention, etc.), define and outline the expectations here.]*

## **Budget**

*Outline the budget for your sales initiatives, including total base salaries, bonus/commission structure, resource and software expenses, discounting, training, travel costs, food, and more.*

*It's helpful to compare the sales budget with your sales forecast, which you can build [here](#).*

## **Did We Miss Something?**

*Add another section here if you need it.*





## Need help putting your sales plan into action?

HubSpot's free CRM and integrated [sales software](#) are a dream come true for companies looking to scale their sales performance.

HubSpot helps you build a contact database, connect with new leads, close deals faster, and manage your pipeline with its integrated CRM and sales software. Track and send emails, manage client meetings, effortlessly access documentation, and build out helpful contact reports.

[Want to learn more? Click here to get started with HubSpot for free.](#)



// After 12 months of using Sales Hub, we saw revenue grow 6X, our sales cycle shortened from 9 months to 4 weeks, and we grew our headcount by 5. //

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Hüify