

Strategic Sales Plan Template

Use this two-page template to create a clear, actionable sales plan aligned with company goals. Review monthly to ensure consistent execution and growth.

1. Mission Statement

Define the core purpose that drives your sales team.

2. Sales Goals & Revenue Targets

Set measurable, time-bound goals (ARR/MRR, conversion rate, retention, CLV).

Primary Revenue Goal	_____
Timeframe	_____
Key Milestones	_____
Core KPIs	_____

3. Target Market & Ideal Customer Profile (ICP)

Define industry, company size, geography, buying process, and decision-makers.

4. Sales Strategy & Customer Journey

Map stages: Awareness → Interest → Consideration → Purchase → Retention.

5. Value Proposition & Competitive Advantage

Focus on benefits, not features. Why do customers choose you?

6. Sales Team Structure

Define roles (SDR, AE, CS), quotas, and incentive structure.

7. Tools & Resources

CRM (Close), prospecting tools, automation, reporting, and budget allocation.

8. Prospecting Plan

Target accounts, outreach strategy, and tracking inside Close.

9. Tracking & Review Cadence

Set monthly reviews and monitor dashboards inside Close.