



# Sales Planning Checklist

It's no secret that making more money is the key to growing your business. But setting a 2018 revenue goal is only the beginning. Making sure you can achieve it is the real challenge.

Are you up for it? Answer the following questions to test your level of preparedness.

## AUDIENCES

- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you understand who your target customers are? Including company type, title/function, pain points, preferred information sources, preferred channels, etc.? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you developed messaging and identified key differentiators to engage your target customers?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you identified who at your target company buys and/or influences a sale?  |

## SALES CHANNELS

- | Yes                      | No                       |   |
|--------------------------|--------------------------|---|
|                          |                          | <b>DIRECT SALES/NEW BUSINESS</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have an expected revenue target attributed to sales lead generation?     |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you determined when different roles engage a target customer?              |
|                          |                          | <b>MARKETING</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have an expected revenue target attributed to marketing lead generation? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you determined when a marketing lead is transferred to sales?              |
|                          |                          | <b>PARTNERS</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have an expected revenue target attributed to partners?                  |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you identified key partners and their value to your business?              |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have someone assigned to manage key partner relationships?               |

Yes      No

### EXISTING CUSTOMERS

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have an expected revenue target attributed to existing customers?                        |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a process to prioritize your "best" customers and an account plan for them?         |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you assigned responsibility for cross-selling, upselling and extending existing customers? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a referral plan that incents existing customers to introduce you to new prospects?  |

## LEAD GENERATION FUNNEL

Yes      No

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a campaign calendar defined to support both direct sales and marketing lead generation?                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you created the content you need for sales enablement and lead generation?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a set lead generation cadence for direct sales lead generation?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you know which marketing channels you'll use to generate leads? Including in-person events, SEO/SEM, email marketing, webinars, etc.? |

## REVENUE PIPELINE

Yes      No

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a pipeline qualification process to determine expected close date and likelihood of a win?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a pipeline review process that prioritizes the opportunities that are "closest to close?"   |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your sales team have the content and tools (sales decks, case studies, referenceable customers, sell sheets, etc.) they need to close opportunities? |

## OPERATIONS

Yes

No

Are roles and responsibilities clearly defined across your sales, marketing, alliances and account teams?

Do you have a defined budget for marketing and sales lead generation?

Is your budget enough to meet your lead generation goals?

Do you have the right automation tools to support each of the sales channels? Including sales automation, CRM, marketing automation, analytics, etc.?

Are you tracking interactions with prospects and customers?

How'd you do? If you found yourself with quite a few No's, don't worry. No's just tell you where you need to start putting in the work. Prioritize each No then start turning them into Yes's to lay the groundwork for hitting your 2018 sales goal.

Don't know how to turn those No's into Yes's? We can talk you through it. Shoot us an email or give us a call. We've got your back.