

SALES PLANNING CHECKLIST



It's no secret that making more money is the key to growing your business. But setting an annual 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
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?	<input type="checkbox"/>	<input type="checkbox"/>

SALES CHANNELS

EXISTING CUSTOMERS	YES	NO
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 the 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?	<input type="checkbox"/>	<input type="checkbox"/>
OUTBOUND PROSPECTS		
Do you have an expected revenue target attributed to outbound sales and marketing lead generation?	<input type="checkbox"/>	<input type="checkbox"/>
Have you determined when different roles engage a target customer?	<input type="checkbox"/>	<input type="checkbox"/>

INBOUND PROSPECTS

YES NO

Do you have an expected revenue target attributed to inbound lead generation?

Have you determined when a marketing lead is transferred to sales?

PARTNERS & ALLIANCES

Do you have an expected revenue target attributed to partners?

Have you identified key partners and their value to your business?

Do you have someone assigned to manage key partner relationships?

RELATIONSHIPS & REFERRALS

Do you have an expected revenue target attributed to personal relationships?

Do you have a defined process for identifying and nurturing personal relationships at target accounts?

LEAD GENERATION FUNNEL

YES NO

Do you have a campaign calendar defined to support both direct sales and marketing lead generation?

Have you created the content you need for sales enablement and lead generation?

Do you have a set lead generation cadence for direct sales lead generation?

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

Do you have a pipeline qualification process to determine expected close date and likelihood of a win?

Do you have a pipeline review process that prioritizes the opportunities that are "closest to close?"

Does your sales team have the content and tools (presentations, line cards, sell sheets, case studies, etc.) they need to close opportunities?

OPERATIONS

	YES	NO
Are roles and responsibilities clearly defined across your sales, marketing and account teams?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a defined budget for marketing and sales lead generation?	<input type="checkbox"/>	<input type="checkbox"/>
Is your budget enough to meet your lead generation goals?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have the right automation tools to support each of the sales channels? Including sales automation, CRM, marketing automation, analytics, etc.?	<input type="checkbox"/>	<input type="checkbox"/>
Are you tracking interactions with prospects and customers?	<input type="checkbox"/>	<input type="checkbox"/>

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 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.