SALES MANAGEMENT TEMPLATE

STRATEGY	PRIORITY	STATUS	% COMPLETE
Identify product features and benefits			
Define USP			
Analyze competitors			
Ideal customer persona			
Evaluate sales funnel			
Estimate how much existing accounts can grow			
Develop referral plan			
Plan lead generation			
Identify new markets			
Set sales goals for each quarter, year			
Forecast sales based on pipeline			

OPERATIONS	PRIORITY	STATUS	% COMPLETE
Update content resources			
What is our current close ratio?			
How many sales needed to reach goal?			
How many calls does that represent?			
How much time does that represent?			
How many new ideal customers will I need to call on to reach revenue goal at current close ratio?			
System for assigning leads			
Assign reps to territories			
Define quotas			
Incentive compensation plan			
Sales administration review			

ANALYSIS	PRIORITY	STATUS	% COMPLETE
Define Key Metrics			
Assess Product Demand			
Evaluate new vs repeat sales			
Sales velocity goal vs actual			
Sales by product			
Sales by channel			
Competitive analysis			
Sales trends			

STAFF	PRIORITY	STATUS	% COMPLETE
Set schedule for regular team meetings			
Develop agenda for team meetings			
Develop cadence for coaching			
Define coaching activities (call review, demo evaluation, etc.)			
Identify needed training resources			
Assign resources to develop training materials			
Team-building activities			
Set schedule for monthly, quarterly and year individual reviews			

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