

HubSpot  aircall

# Free Sales Plan Template

Outline your company's sales strategy in one simple, coherent plan by HubSpot and Aircall.



# Hi There.

## Thanks for Downloading This Resource.



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1. Edit this version to fit your needs.
2. Go to “File” > “Download As” > “Microsoft Word” to Download.

## How to Use This Template

Thanks for downloading HubSpot and Aircall’s Sales Plan Template!

This resource is built for you to outline your company’s sales strategy. Included are the sections that exist in most sales plans, as well as prompts for you to fill out your company’s tactics and information. Simply erase the instructions under each header and replace them with what makes sense for your business. You can choose from either a plain text template or a customizable designed variation that you can update with your brand logo and colors.

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, you are encouraged to make those changes as you see fit for your business.

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The image shows a cover for a sales plan template. It features a dark blue central area with a wavy top and bottom edge, set against a white background. The top and bottom wavy edges are filled with a solid orange color. The text is centered in the dark blue area.

**Plain Text  
Sales Plan Template**

*[Company Logo]*

*[Company Name]*

*Sales Plan: [Period of Time, i.e. Q1 2019, FY 2020]*

*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 whichever 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 representations 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 it is to know who to target. Outline the people, businesses, and/or buyers who are unqualified to pursue as prospects and why.]*

## Customer Experience

*[What are the customers' perceptions and experience with your business or brand? Customer experience includes every interaction they have with you—from navigating your website to talking with your customer service team.*

*Describe your customer journey, including the touch points and communication channels they use to discover products, make purchases, and reach out to support teams. If you're in the process of building a customer service department, use these [best practices](#) to get started.]*

## 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 use to do their jobs. This may include sales enablement tools, productivity and collaboration tools, customer case studies, suggested negotiation practices, tools for recording and analyzing sales calls to improve close rates, and more.*

*Sales leaders can leverage lots of tools to set up efficient workflows that correspond to your overall sales strategy. For example, [Aircall](#) lets you combine a cloud-based phone system with your current software integrations—giving you all the [tools and data](#) needed to optimize sales processes in a single platform.*

*In a nutshell, if there's something your business can offer to strengthen a salesperson's performance, identify it here.]*

### Relationship Between Sales and Customer Support

*[How do your sales and customer service teams work together? Sales teams work to reel customers in, and support teams keep them around, but sharing information is key to make sure both departments perform optimally. If you don't have a system for data sharing, there are lots of tool integrations you try to increase [visibility and alignment](#).]*

### Sales Training

*[List all the training you provide for your sales team to achieve their goals.]*

## 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.]*

Pricing Strategy

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

Marketplace Risks

*[Identify the risks in your marketplace or industry. This could be a strategic risk, compliance and regulatory risk, financial risk, or operational risk.]*

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?]*

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?*

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

**New Market Opportunities**

*[Identify the new market opportunities that your business can expand into. This could be growing into a vertical industry or segment, possible new product lines, exploring new channels, or targeting different consumer niches.]*

## 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.*

### Inbound Marketing:

#### 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.]*

#### Demand Generation Marketing

*[Briefly explain your demand generation 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. This includes all activities to drive existing customer loyalty and retention.]*

#### Email Marketing

*[Briefly explain your email marketing strategy and who on the team should be consulted for questions. This includes email newsletters, promotions, and retargeting, but not outbound cold emails.]*

#### Social Media Marketing

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

### Outbound Marketing:

### Direct Mail Marketing

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

### Outbound Email Marketing

*[Briefly explain your outbound email marketing strategy and who on the team should be consulted for questions. This could include cold email marketing for B2B businesses.]*

### Cold calling

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

## **Prospecting Strategy**

*What steps should sales teams take to qualify leads generated by marketing 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 on 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.]*

*Cold outreach is an essential prospecting strategy for B2B businesses, and should include plans for generating leads, nurturing leads, and following up with warm contacts. [This guide](#) has more tips for building a successful cold calling strategy.]*

## Referral Strategy

*[Talk about your company's plans for generating and increasing recommendations and word of mouth. Use this to grow your customer base through your existing customers.]*

## Customer Feedback Process

*[What is the customer feedback process and how will your business use feedback to improve the sales cycle? Here's an example of how you can set up a [customer feedback](#) system to continuously optimize sales performance and improve your products/services.]*

## **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 will work on high-profile clients, 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.]*

### Sales Cycle Target Length

*[What is the length of your sales cycle or sales pipeline? Track the length and optimize your sales process. The shorter your sales cycle, the faster you can acquire new customers.]*

### 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.*



**Designed  
Sales Plan Template**



# Company Name

## Sales Plan

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### Our Objective

Summarize the role your company's sales department plays to the growth of your business. This statement should reflect your overall strategy outlined in the pages that follow.

### Authors of Document

[Name #1]  
[Email Address #1]

[Name #2]  
[Email Address #2]



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Target Market	#
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Positioning	#
Marketing Strategy	#
Prospecting Strategy	#
Action Plan	#
Goals	#
Budget	#

# Mission and Background

## Mission Statement

[Company name] is a company headquartered in [location of HQ] with offices in [satellite office locations]. The company's mission is to [mission statement].

## Vision Statement

The company's mission is to [vision statement].

## Company History/Story

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



### Pro Tip:

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. You can [use these mission statement templates](#) to get started if you need help.



# Team

## 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.]



### Pro Tip:

Check out HubSpot's [Organizational Chart Templates](#) offer to visualize your team structure.

# Target Market

## Locations Targeting

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

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## Customer Experience

What are the customers' perceptions and experience with your business or brand? Customer experience includes every interaction they have with you—from navigating your website to talking with your customer service team.

Describe your customer journey, including the touch points and communication channels they use to discover products, make purchases, and reach out to support teams. If you're in the process of building a customer service department, use these [best practices](#) to get started.]



**Pro Tip:**

The customer journey is crucial to understand in your sales process. You can use these [Customer Journey Map Templates](#) to outline your touchpoints throughout the experience.

# 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.]

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[In a nutshell, if there's something your business can offer to strengthen a salesperson's performance, identify it here.]

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[List all the training you provide for your sales team to achieve their goals.]



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

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[Identify the risks in your marketplace or industry. This could be a strategic risk, compliance and regulatory risk, financial risk, or operational risk.]

## 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?]

# 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?
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[Identify the new market opportunities that your business can expand into. This could be growing into a vertical industry or segment, possible new product lines, exploring new channels, or targeting different consumer niches.]

Competitor Name	Comparative Strength(s)	Comparative Weakness(es)	Counterpoint(s)
Competitor A	TBD	TBD	TBD
Competitor B	TBD	TBD	TBD

Competitor C	TBD	TBD	TBD
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**Pro Tip:**

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.



# Marketing Strategy

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## Inbound Marketing

Method	Description
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.]
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Customer Marketing	[Briefly explain your customer marketing and referral strategy and who on the team should be consulted for questions. This includes all activities to drive existing customer loyalty and retention.]
Email Marketing	[Briefly explain your email marketing strategy and who on the team should be consulted for questions. This includes email newsletters, promotions, and retargeting, but not outbound cold emails.]

## Outbound Marketing

Method	Description
Direct Mail Marketing	[Briefly explain your direct mail marketing strategy and who on the team should be consulted for questions.]
Outbound Email Marketing	[Briefly explain your outbound email marketing strategy and who on the team should be consulted for questions. This could include cold email marketing for B2B businesses.]

## Cold Calling

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



### Pro Tip:

It's important to be consistent with your marketing goals. To that end, make sure you run this section by your marketing team before this plan is complete.

If needed, you can use HubSpot's [Marketing Plan Template](#) to get on the same page here.

# Prospecting Strategy

*What steps should sales teams take to qualify leads generated by marketing 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 on qualified contacts.]

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# 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 will work on high-profile clients, etc.*

Tactic	Description
Tactic #1	[Explain the first tactic and copy/paste this section as needed for more tactics in your action plan.]
Tactic #2	[Explain the second tactic and copy/paste this section as needed for more tactics in your action plan.]
Tactic #3	[Explain the third 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?]

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## Did We Miss Something?

Add another section here if you need it.



### Pro Tip:

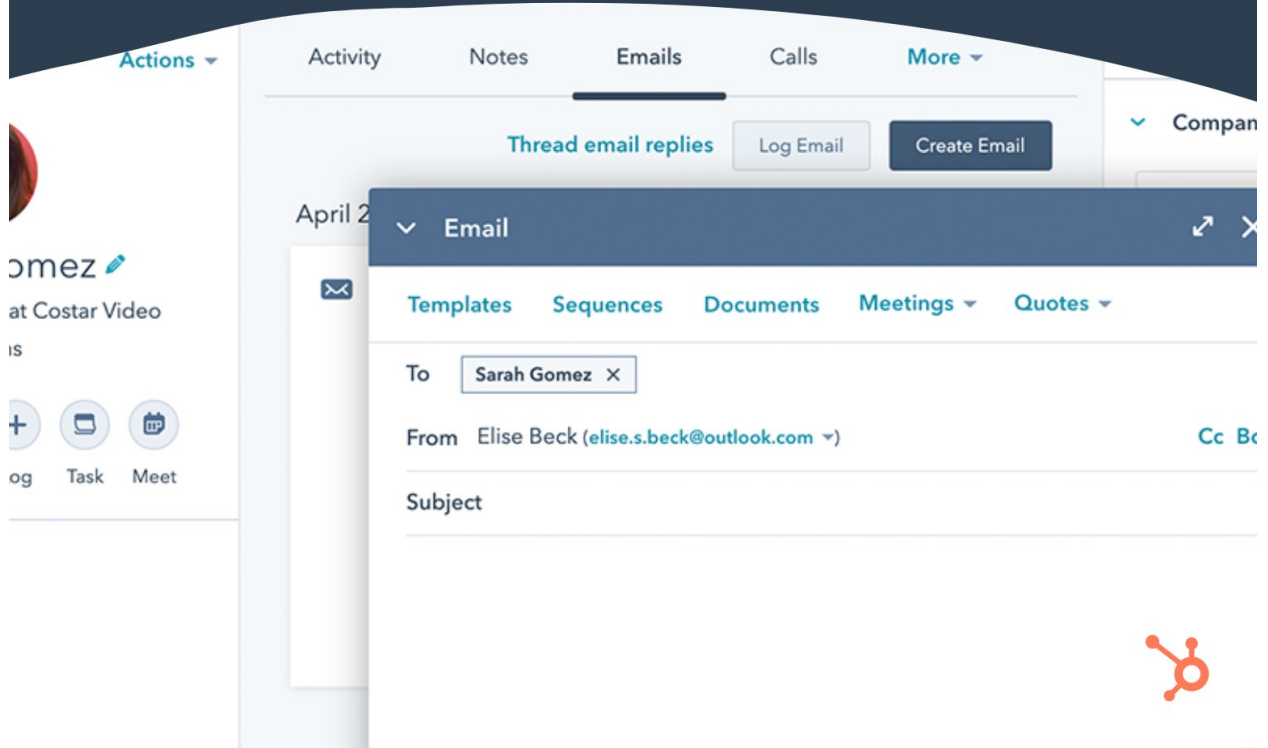
It's helpful to compare the sales budget with your sales forecast, which you can build [with this free Sales Forecasting Template](#).



# Need help putting your sales plan into action?

Sales Hub eliminates friction by bringing all your tools and data together on one easy-to-use, powerful platform your whole team will love. Now you're freed up to focus on what really matters: your customers.

Get Started





## Want the best tools for executing your sales plan?

Aircall is the cloud-based call center software for modern businesses. It's simple to set up, easy to use, and consolidates all your tools for smoother support, smarter sales, and better overall business performance.

Aircall integrates with Hubspot's CRM and sales software, giving you full visibility and collaboration features for sales agents in a single place. See all your call center analytics, create custom workflows, improve sales training, automate dialling, and share lead data seamlessly across teams.

[Book a Demo](#)



" Instead of digging through multiple systems trying to find clues, the right information is already there, helping us anticipate an issue before the customer even mentions it "

— Lauren Panken, Operating Systems Manager at UNTUCKit



" The setup and configuration of Aircall is a dream. It's so easy to create new numbers, set up IVRs, and change people around to different teams if needed. "

— Sara Tiffany, General Manager at AirTorks



" For a business development team, fast and easy dials are absolutely necessary. It directly impacts our velocity, and the volume of business we create and close. "

— Kateryna Keretsman, Head of BDR at Socialbakers



" We examined a bunch of providers and Aircall was the only one that allowed us the flexibility to customize our customer service needs based on our business practices. "

— Anton Zillberberg, CEO and Founder at QuickStay