



Sales Strategy Template

Create a sales strategy template

With a sales strategy in place, you are now ready to break down your plan into bite-size steps. This enables you and your sales team to execute and move forward every single day. Use the sales strategy template below to come up with an actionable plan for your business.

Determine your target

- Your target should be specific, measurable, attainable, realistic, and timely (SMART). No additional software/hardware costs.
- Bad target: “increasing sales figures”
- SMART target: “\$25,000 in the third quarter of 2018”.No additional software/hardware costs.

Write down customer persona

Using Small Business Owner Stephen as an example, write your own customer persona that includes these details:

- Personal Background
- Frustrations or Pain Points
- Professional Background
- Stage in the Buying Process

Conceptualize lead generation process

With a clear customer persona, the next step is to find and reach out to your customers.

Inbound marketing

- SEO blog posts
- Organic social media
- Webinars or Free Courses
- Branding
- Podcasting
- Others

Outbound marketing

- Outsourcing
- TV, radio, internet, or social media ads
- Purchase leads
- Cold calling
- Others

Put together sales process documentation

Create the resources that your team needs to successfully generate leads.

- Cold calling script
- Elevator pitch
- Email messages
- Social media marketing messaging series

Overcome customer resistance

Even though you have the best solution in the market, you will likely face resistance before you can make a sale. Help your sales team close with these resources:

- Objection management template
- Trial period or trial version
- List of discounts and offers
- Others

Manage customer expectations

After you close deals, sit down with your new customers and set their expectations.

- Onboarding requirements and resources
- List of expected results after using your solution
- Assign point of contact
- Others

Track and improve performance

Identify key performance indicators (KPIs) so you can evaluate and optimize the performance of your sales strategy.

- Email open rate
- Average cost per lead
- Conversion rate
- Number of calls or emails per sales rep
- Quote to close ratio
- Others

Using this sales strategy template, you can come up with an actionable plan that sets your team up for success. However, don't expect your plan to give you overwhelming results in your initial attempt. You need to continuously optimize your sales strategy and apply incremental improvements. With experience, you'll eventually put together a sales strategy that's both predictable and scalable.

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