

SALES & MARKETING PLAN TEMPLATE

(For Entrepreneurs & SMEs)

1. Executive Summary (1 Page Maximum)

Business Name:	
Industry:	
Target Market:	
Revenue Goal (12 Months):	

Primary Growth Strategy: (e.g., expand market share, increase prices, launch new product, improve retention)

Summary of Plan:

- What are you selling?

- Who are you selling to?

- How will you reach them?

- What revenue are you targeting?

2. Market Analysis

2.1. Target Customer Profile (Ideal Client)

Demographics

Age	
Gender	
Income level	
Location	
Education level	

Psychographics

Lifestyle	
Interests	
Buying behaviour	
Main problems/Pain Points	
What influences their buying decisions?	

Top 3 Problems We Solve

1.	
2.	
3.	

2.2. Market Size & Opportunity

Estimated market size:	
Growth trends in industry:	
Market gap/opportunity identified	

2.3. Competitor Analysis

Competitor 1

Strengths 1

Weaknesses 1

Price Level 1

What We Do Better 1

Our Competitive Advantage (USP):

3. Sales Goals & Targets

3.1. Revenue Targets

Period	Revenue Target	Units to Sell	Avg Price	Notes
Month 1				
Month 2				
Month 3				

Annual Revenue Target:

Monthly Revenue Target:

3.2. Sales KPIs (Key Performance Indicators)

Number of leaders per month	
Conversion rate	
Customer acquisition cost (CAC)	
Average order value (AOV)	
Customer lifetime value (CLV)	
Retention rate	
Sales growth % target	

4. Marketing Strategy

4.1. Brand Positioning

Our Brand Promise:

Core Message:

Brand Personality: (e.g., professional, bold, friendly, premium, affordable)

4.2. Marketing Channels

Tick and complete what applies:

Digital Marketing

☐ Website

☐ SEO

☐ Social Media

☐ Email Marketing

☐ WhatsApp Marketing

☐ Paid Ads (Google/Facebook/Instagram)

☐ Content Marketing (blogs, videos)

Offline Marketing

- ☐ Networking
- ☐ Referrals
- ☐ Events
- ☐ Flyers
- ☐ Partnerships
- ☐ Cold calling

4.3. Channel Plan

Channel	Objective	Budget	Frequency	Expected Result
Social Media				
Email				
Paid Ads				

5. Sales Strategy

5.1. Sales Process

Describe your step-by-step sales funnel:

1. Lead generation

2. Lead qualification

3. Presentation/demo

4. Proposal/quote

5. Closing

6. Follow-up

7. Retention/upsell

5.2. Pricing Strategy

- ☐ Premium pricing
- ☐ Competitive pricing
- ☐ Penetration pricing
- ☐ Cost-plus pricing
- ☐ Value-based pricing

Average Gross Margin Target: %

5.3. Sales Tools Needed

- ☐ CRM
- ☐ Quotation template
- ☐ Sales script
- ☐ Brochure
- ☐ Product samples
- ☐ Testimonials

6. Marketing Budget

Item	Monthly Budget	Annual Budget
Advertising		
Content creation		
Design/branding		
Events		
Software tools		

Total Marketing Budget:

Marketing Budget as % of Revenue:

7. Customer Retention Plan

How will you keep customers?

☐ Loyalty program

☐ Email follow-up

☐ After-sales service

☐ WhatsApp communication

☐ Membership/subscription

☐ Referral rewards

Retention Strategy Details:

8. Action Plan & Timeline

Action Item	Responsible Person	Deadline	Budget	KPI

9. Risk Assessment

Risk	Impact	Mitigation Strategy

10. Review & Measurement

How often will this plan be reviewed?

- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly

What will be measured?

- Revenue
- Lead generation
- Conversion rates
- ROI on marketing
- Customer satisfaction