

Sales Representative Business Plan

Name: _____

Territory: _____

Performance Period: _____

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Quotas

Key Performance Indicators	2011 Quota	2011 Actual	% Achievement	2012 Quota	% +/- 2011 Actual
KPI #1					
KPI #2					
KPI #3					
KPI #4					
KPI #5					

Information about KPI's can be found at
<http://settingsales.com/sales-quotas/>

Top Five Wins

Top 5 Wins	Company Name	Contact	Product	\$'s	Quantity	Competition	Competitive Advantage
#1							
#2							
#3							
#4							
#5							

Top 5 Losses

Losses	Company Name	Contact	Product	\$'s	Quantity	Competition	Reason for Loss
#1							
#2							
#3							
#4							
#5							

Sales Metrics

	2011 Total	Average Per Month	2012 Goal	Average Per Month
Client Visits				
Demonstrations				
Proposals/RFX's				
Performance:				
KPI #1				
KPI #2				
KPI #3				
KPI #4				
KPI #5				

Territory SWOT Analysis

	Strengths	Weaknesses
People		
Processes		
Technology		
	Opportunities	Threats
People		
Processes		
Technology		

Top 5 Sales Prospects SWOT Analysis

Company Name	Strengths	Weaknesses
1		
2		
3		
4		
5		
	Opportunities	Threats
1		
2		
3		
4		
5		

Competitive SWOT Analysis

Competitor	Strengths	Weaknesses
1		
2		
3		
4		
5		
	Opportunities	Threats
1		
2		
3		
4		
5		

