

SUPERCHARGE YOUR SALES TRAINING

3

SALES PLAN OF ATTACK WORKBOOK

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SUPERCARGE YOUR SALES

Sales Plan of Attack Workbook

Welcome to the ***Sales Plan of Attack Workbook!***

There are two parts of this exercise:

- **The Workbook:** which will walk you through some of the essentials and help you create your sales plan.
- **The Worksheet:** which will help you track your sales, track your progress and allow you to have an up to date review with your sales growth.

Both of these are designed to use every year so please use this as a part of your business and sales plan on an ongoing basis.

To get started, let's review your sales goals and objectives for the year. We could go into the weeds and get super duper detailed here. You have that option on the Sales Plan of Attack Worksheet. However, for now, we'll keep it simple and work with some round numbers.

Creating Your Sales Goals

I want you to think about your goals. You can review the worksheets in the previous trainings to refresh and review. Then let's think BIG and put some bigger goals out there.

You want your goals to range in a way that pushes you to work harder. Your "must have goal" should be fairly achievable. Your "nice to have goal" should be a challenge but not feel unattainable. Your "stretch goal" might make you tingle a little and feel a little challenging to hit, but if you put your sales plan to work, you can make it happen.

For example

- Must-have goals might be a 20% increase.
- Nice-to-have goals might be a 35% increase.
- Stretch goals might be a 50% increase.

Fill in the blanks below and write down:

Must-Have Goals	Nice-to-Have Goals	Stretch Goals





Your Sales Plan

Creating your Sales Plan of Attack should combine a combination of business evaluation and goal setting to create a strategy about what to focus on. As a reminder, we are going to walk through some important data that we need to create an awesome sales plan.

What were your sales last year?

What is your sales goal for this year?

How much revenue do you need to generate to hit your projection or goal for this year?

Is there a percentage increase/decrease over the previous year? List here

Why?

If increase, what specific actions did you take?

If flat, have you done anything differently?

If decrease, list reasons why... what do you plan on doing to make up for it?





Identify your top 3 revenue streams from your sales evaluation exercise.

Top 3 Revenue Streams	Gross Income	% of Business	Excitement Level

Sales Plan of Attack

Now it's time to get all of this data working for you. You can chose to use your top 3 revenue streams here to evaluate how you are going to hit your goals. You can use these revenue streams to create your plan for existing and new business.

A sales plan needs to include some important parts. Typically there are 4 basic parts of a sales plan:

1. **Existing Business:** Your existing business growth strategies
2. **Existing Business Tactics:** Your existing business growth tactics
3. **New Business:** Your new business acquisition strategies
4. **New Business Tactics:** Your new business acquisition tactics

Just to be clear, let's differentiate clearly between strategy and tactics.

The terms **tactic** and **strategy** are often confused: **Tactics** are the actual means used to gain an objective, while **strategy** is the overall campaign plan, which may involve complex operational patterns, activity, and decision-making that lead to tactical execution.

~Wikipedia.org

The "Strategy" can be considered the "What" part of the plan and the "Tactics" can be considered the "How" part of the plan.

Your strategies should often be connected to your revenue streams and how you plan to expand on what is already working while expanding in other areas.

Here is an example of how you would use data to make a plan for existing or new business.





Existing Business Strategies:

Strategy 1:	Revive Stagnant Wholesale Accounts
Strategy 2:	Nurture and Grow Active Wholesale Accounts by 20%
Strategy 3:	Increase E-Commerce Sales by 50%

Existing Business Tactics (Strategy 1): Revive Stagnant Accounts

Tactic 1:	Make a list of accounts who have not reordered in the past 5 years
Tactic 2:	Create a call campaign to call accounts who have not reordered in the past 2 years to check in
Tactic 3:	Create an email campaign with a special offer for dead accounts more than 2 years old
Tactic 4:	Mail out postcards to inactive buyers and follow up 2 weeks later
Tactic 5:	Call or email to book appointments for upcoming trade shows

New Business Tactics:

Strategy 1:	Build Multi-Door Specialty Store Business
Strategy 2:	Increase Boutique Business
Strategy 3:	Land 2 Department Store Accounts





Tactics for Strategy 1: Build Multi-Door Specialty Store Business

Tactic 1:	Identify the key retailers we want to target
Tactic 2:	Research the stores
Tactic 3:	Mail a welcome pack to the buyer
Tactic 4:	Follow-up with a phone call and email per protocol for appointments and orders
Tactic 5:	Mailer Campaign Pre-Trade Show
Tactic 6:	Book Appointments for Trade Shows
Tactic 7:	Offer to create buys





Building Your Sales Plan of Attack

Existing Business Strategies

Enter your existing business strategies here. You might want to consider the profitable revenue streams that you already enjoy when filling this out.

Strategy 1

Strategy 2

Strategy 3





Existing Business Tactics: Strategy 1

Enter your existing business tactics or brainstorm new tactics that you would like to implement. Make sure these tactics support you overall revenue goal and the strategy listed.

Strategy 1

Tactic 1

Tactic 2

Tactic 3

Tactic 4

Tactic 5

Tactic 6

Tactic 7

Tactic 8

Tactic 9

Tactic 10

Tactic 11

Tactic 12

Tactic 13

Tactic 14

Tactic 15





Existing Business Tactics: Strategy 2

Enter your existing business tactics or brainstorm new tactics that you would like to implement. Make sure these tactics support your overall revenue goal and the strategy listed.

Strategy 2

Tactic 1

Tactic 2

Tactic 3

Tactic 4

Tactic 5

Tactic 6

Tactic 7

Tactic 8

Tactic 9

Tactic 10

Tactic 11

Tactic 12

Tactic 13

Tactic 14

Tactic 15





Existing Business Tactics: Strategy 3

Enter your existing business tactics or brainstorm new tactics that you would like to implement. Make sure these tactics support you overall revenue goal and the strategy listed.

Strategy 3

Tactic 1

Tactic 2

Tactic 3

Tactic 4

Tactic 5

Tactic 6

Tactic 7

Tactic 8

Tactic 9

Tactic 10

Tactic 11

Tactic 12

Tactic 13

Tactic 14

Tactic 15





New Business Strategies

Enter your NEW business strategies here. Consider new revenue streams you want to pursue or expand upon. Or perhaps new stores or accounts or want to delve into your E-Commerce or Private Label.

Strategy 1

Strategy 2

Strategy 3





New Business Tactics: Strategy 1

Enter your new business tactics or brainstorm new tactics that you would like to implement. Make sure these tactics support you overall revenue goal and the strategy listed.

Strategy 1

Tactic 1

Tactic 2

Tactic 3

Tactic 4

Tactic 5

Tactic 6

Tactic 7

Tactic 8

Tactic 9

Tactic 10

Tactic 11

Tactic 12

Tactic 13

Tactic 14

Tactic 15





New Business Tactics: Strategy 2

Enter your new business tactics or brainstorm new tactics that you would like to implement. Make sure these tactics support you overall revenue goal and the strategy listed.

Strategy 2

Tactic 1

Tactic 2

Tactic 3

Tactic 4

Tactic 5

Tactic 6

Tactic 7

Tactic 8

Tactic 9

Tactic 10

Tactic 11

Tactic 12

Tactic 13

Tactic 14

Tactic 15





New Business Tactics: Strategy 3

Enter your new business tactics or brainstorm new tactics that you would like to implement. Make sure these tactics support your overall revenue goal and the strategy listed.

Strategy 3

Tactic 1

Tactic 2

Tactic 3

Tactic 4

Tactic 5

Tactic 6

Tactic 7

Tactic 8

Tactic 9

Tactic 10

Tactic 11

Tactic 12

Tactic 13

Tactic 14

Tactic 15





Examples from the Training for Inspiration

Existing Customer Strategy:

Strategy 1:	Increase ecommerce order size
Strategy 2:	Increase reorder percentages
Strategy 3:	Reduce abandoned carts

Tactics for Strategy 1: Increase ecommerce order size

Tactic 1:	Increase upsell conversions
Tactic 2:	Increase exposure of higher priced items

Tactics for Strategy 2: Increase reorder percentage

Tactic 1:	Create a follow up automated nurture sequence
Tactic 2:	Call the customer and leave a voicemail thanking them for their order
Tactic 3:	Provide an invite into the VIP membership or jewelry of the month club
Tactic 4:	Send VIPs monthly offers and email at least once a month

Tactics for Strategy 3: Reduce abandoned carts

Tactic 1:	Install abandoned cart sequence plugin to website
Tactic 2:	Create a follow up sequence for abandoned carts
Tactic 3:	Test conversions and tweak the sequence
Tactic 4:	Retargeting ads for abandoned carts (on FB or Adroll)





New Customer Acquisition Strategy

Strategy 1:	Build email list consistently
Strategy 2:	Media Push
Strategy 3:	Partner with Affiliates and Brand Advocates

Tactics for Strategy 1: Build email list consistently

Tactic 1:	Create an enticing opt in offer like a free guide or exclusive membership
Tactic 2:	Focus on content marketing to increase website traffic
Tactic 3:	Post on social media platforms daily
Tactic 4:	Funnel current buyers into the email list
Tactic 5:	Cross promote with other brands (Etc.)

Tactics for Strategy 2: Media Push

Tactic 1:	Pitch to magazine editors monthly
Tactic 2:	Pitch Bloggers monthly
Tactic 3:	Pitch Social Media Influencers Weekly
Tactic 4:	Get product placements on celebrities and high profile entrepreneurs (Etc.)

Tactics for Strategy 3: Partner with Affiliates and Brand Advocates

Tactic 1:	Create a customer loyalty program
Tactic 2:	Create a customer referral program
Tactic 3:	Develop partnerships with entrepreneurs w/ similar audiences (ie. Wedding Blogger with Bridal Jewelry)
Tactic 4:	Develop Affiliate Relationships with influencers and bloggers (Etc.)

