Sample Sales and Marketing Plan

GOAL	TARGET	STRATEGIES	TACTICS/MESSAGES	CALENDAR	MEASUREMENT
Specific, measureable objectives to be accomplished in a time period.	*Specific, reachable segments of people with similar needs or interests, motivations, demographics, locations, etc. How many organizations/ people are there in each segment?*	*Strategies that will attract the specific people or organizations you're trying to reach with a compelling offer that meets their interests/needs.*	*Tools or channels you'll use to reach your targets. What's unique or special about your product/services/bio/ history that will connect with people? Which messages will be persuasive?*	*Specify which activities you will do daily, weekly, monthly or quarterly to achieve your goals.* *What time of day or day of week is most effective for each activity?*	*How will you track results? How will you compare the effectiveness of each tactic? How will you calculate time/money/ # of contacts it takes to attract/retain each customer/client?*
Sample Goal #1: Increase sales between 9:30-11:30am from $xx in 2013 to $yy in 2014.	Existing and new customers who are parents of small children. --Live or work in 5 mile radius --Flexible schedules --Looking for social contact	Offer free coffee with $5+ purchase between 9:30-11:30am Facilitate a knitting group Provide kids play area between 9:30-11:30am	Channels: Reach existing customers via email, blog, social media. Reach potential customers via website and social media, also promote via websites, listservs, publications. Print postcards/flyers. Message: "Family hours, easy parking meet other parents."	Ask customers if you can take photos and tag them on Facebook. Post reminders on Facebook and Twitter before and during the target time period. Create weekly promotion schedule. Distribute postcards or flyers at least once a	Total sales in time period Additional expenses (if any) Total # of customers Average sales per customer Test which times of day/days of week get most engagement

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				month.	leading to sales
Sample Goal #2: Get at least 10 former clients to hire my company again during 2014.	Local non-profits with annual budgets of at least $500,000.	Offer a free workshop or training in a related service	Channels: Postcard, email, phone calls, meetings, webinars. Message: Save time and money for your mission by cutting overhead with xyz technique.	Email 2 former clients each week. Follow up by phone the next week. Schedule 1 group workshop or 3 1-on-1 trainings per month. Close at least 1 sale per month.	Total # of former clients contacted per month Total # reached Total # demos Total # new contracts Total monthly sales
Sample Goal #3: Attract at least 3 new massage clients per month in 2014.	Professionals who are based in home offices --Live or work within 5 miles --Work at computer all day --Suffering from back, neck or shoulder pain --Active on social media	Partner with a yoga studio to offer discounts to their students. Partner with local coffee shop that attracts self-employed workers to set up station for free 10-minute neck and shoulder massages Offer "2 for 1" discount to current clients who bring in a new client.	Channels: Run Facebook ads targeting home-based professionals in 5 mile radius. Use email marketing to encourage existing clients to refer others. Messages: Are you in pain? Get relief for your back now! We can see you today. (Set aside time for same-day appointments.)	Run Facebook ad campaign at different times of day/days of week to test best responses. Email a different segment of your list each week with customized messages and offers. Personalize your brand – if you're a former software programmer, reach out to potential clients in high tech.	# of impressions # of contacts made # of new clients recruited through each channel Cost for each new client acquisition (including value of your time) Retention rates