

Sales & Marketing Plan Template

Goal: Your goal is the desired primary outcome. It should describe what your company needs to achieve in order to be successful. Make this a SMART goal: specific, measurable, actionable, realistic and time-bound. You only have one of these on your strategic plan.

Marketing Objective: Objectives are measurable steps you take to achieve your strategy. A marketing objective could be related to increasing leads or website visitors. It could be related to your social media strategy or email campaigns. You can have several of these, but try to keep it as concise as possible. You might have four to 12 objectives, give or take.

Marketing Tactic: A tactic is a tool you use to achieve your objectives. You should have lots of these – anywhere from three to 10 (or so) per objective.

Marketing Tactic: Add additional tactics here.

Marketing Tactic: Keep adding tactics until you run out of ways to achieve your objective. Then prioritize your tactics. You likely cannot or will not complete them all.

Sales Objective: If possible, include sales objectives as well. Think about things like the number of new clients you want to bring or a revenue goal to reach in a particular area. Remember, you might have four to 12 objectives, give or take.

Marketing Tactic: Add additional tactics here. It usually takes a few marketing tactics, as well as sales tactics to reach a sales objective.

Sales Tactic: Add additional tactics here.

Sales Tactic: Add additional tactics here. Keep adding tactics until you have everything it will take to achieve your stated objective.

Sales & Marketing Objective: Sometimes an objective has both sales and marketing characteristics. For example, converting prospects into clients, growing paid memberships or lowering the cost of acquisition.

Marketing Tactic: Add additional tactics here.

Marketing Tactic: Add additional tactics here.

Marketing Tactic: Add additional tactics here.

Sales Tactic: Add additional tactics here.

Sales Tactic: Add additional tactics here. Keep adding tactics until you have everything it will take to achieve your stated objective.

Keep adding objectives and tactics until you have exhausted all of your ideas on how to achieve your goal. When you're done, take a break. Then, with fresh eyes, come back and read it all the way through and make edits. Spend some time reorganizing and prioritizing the tactics that are most likely to help you achieve your objectives and your goal.

Budget:

Explain the budget needs here. For example, cost per acquisition, total dollars allocated, any circumstances that would change your budgeting. Have your current expenses handy.

Item	Cost	Percent of Budget	Notes

Competitors: Make a list of your competitors. Who do you need to keep an eye on? This list will come in handy when you begin competitive analysis.