

History.

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- Do you have a 2017 sales strategy in place? Yes/No. If yes, please attach it.
- Please complete the following table of your sales for the past 6 months. This will help us serve you better. (Please complete this section honestly. Don't forget that we have a non-circumvention non-disclosure agreement in place. Your revenue will therefore be kept confidential).
- What was your turnover for 2016?

Month (specify) Sales Target Sales Revenue

Sales goals.

What are the sales goals (including sales revenue) of your business for the next year? [Your goals should be specific, measurable, attainable, realistic and time specific — and stated in either monetary or volume terms. For example: 'We want to acquire 5 new clients per month, with a targeted contract value of R5 million for the next year' OR 'we want to sell 150% of projected sales within the next year'. Be as realistic as possible in your forecast. Use your recent revenue history as a guide, accounting for significant changes in the market that may decrease your revenue or create new opportunities in the future.]

Break your goals into quarterly, monthly and weekly targets:

Quarterly

Monthly

Weekly

• Complete the following table with regard to the new opportunities you are pursuing?

New Opportunities

Potential Value

Probability (%)

When do you expect closure of deal

What is your sales forecast (what do you project you will achieve) in terms of the following:

- What is the sales measurement unit you use in your business (e.g. service hours, units sold, etc.)
- What is your gross proft per unit mentioned above?
- How many units do you plan to sell for the year to hit your annual sales target?
- What is your anticipated profit margin per product/service?

Resource, skills & capabilities.

- How many sales staff members do you have? (sales managers, sales people, etc.)
- What resources (e.g. sales staff, money, office space), skills (i.e. technical training) and capabilities (e.g. sales planning, key account management) are required in order to support your goals and objectives? How much will these cost you?
- Resources
- Skills
- Capabilities

Target Market.

- Who is your target customer for each product/service?
- Which geographical area(s) are you targeting per product/service?
- What is the size of your market(s) in monetary terms?
- What are the current and projected market or demand drivers for your product/services?
 (E.g. legislation, consumer demand, seasonal factors, technology, etc.)
- Who is the person you generally sell to per product/service? [CEOs, marketing managers, HR managers, etc]
- When a potential customer does not purchase your products/services, what are their stated reasons?

Products/ Services.

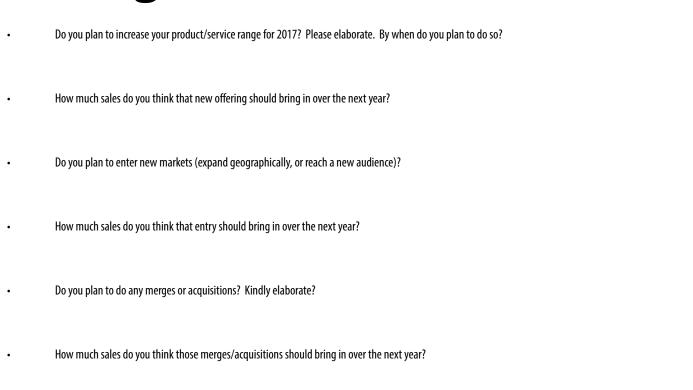
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- What are the products/services that your company sells/offers? List each of your offerings.
- What are the general customer pains [frustrations, obstacles, annoyances, malfunctions, fears, etc.] that your products/services aim to solve?

Competitive Advantages.

- Who are your competitors? What are their products/services, size, revenue, strengths/weaknesses?
- Are any potential competitors on the horison?
- What are your competitive advantages or unique selling points? How are you better, cheaper, faster . . . List them all.

Growth Strategies.



Which partners (current and potential) do you have to deliver your offering to the market. What are their specialities?

Route to Market.

- How will you reach the customer?
- o Directly (e.g. cold calling, networking, emails, telesales, LinkedIn, e-commerce, etc.)
- o Through channel partners? Which ones and why?
- o What is the percentage markup you make per partner?

Marketing Support.

- What marketing efforts do you plan to employ to support your sales endeavours? E.g., trade shows, webinars, print advertising, websites, social media, etc.
- How much did you budget for these marketing efforts?
- Are the following marketing materials professionally prepared in order to assist your sales efforts?
 Website
 Sales brochure
 Email signature
 Business cards
 Powerpoint presentation
- If not when and how will you get them ready?

Sales Management.

What systems do you have in place to review or track sales performance?

[Weekly sales reports, sales management meetings, monthly & quarterly reviews, etc.]

- What performance incentives do you have in place? e.g. prizes, bonuses, etc. [Ensure they are realistic, challenging and motivating]. How are these incentives structured?
- What is your discount structure?
- Does your sales person/team have a detailed and documented profile of each customer (needs, company size, purchase history, psychographics, buying process, etc.)?

- Complete this for each of your sales people (copy the set of the metrics below for each additional sales person you have) New clients. Each sales person has to: (be realistic) 0 Send about emails to new prospects each week Make cold calls of introduction to new prospects each week. Make face-to-face contacts with new prospects each week. Create proposals each week Make presentations each week. Complete tenders per month (if applicable) Join/participate in professional associations and organisations per that his/her best prospects and customers belong to. Where possible, purchase the mailing list of these associations and organisations Attend trade shows / expos per year. List them, their dates, and costs. **Existing customers** 0 Knock on no less than new doors, departments and divisions within each of my existing customers' businesses. Get referrals per (names and phone numbers of someone your customer personally knows who may have use for my products) from my existing customers Contact each existing customers no less than a month with a new idea they cannot get from anyone else. Personally meet top executives at each of my existing customers' businesses per Create a noteworthy monthly newsletter. Take at least existing customers to lunch each month. What is the length of a typical sales cycle per product/service (one week, 2 months, 6 months?)
- What is the conversion rate per sales person, i.e. for every 10 prospects seen, how many translate into sales deals?
- Identify your top 20 clients, state your next step with each of them, and how much you hope to unlock in sales from them for the year?

