

REST OF YEAR SALES PLAN

A Working Tool — Not a Document. Build It. Use It. Adjust It.

Developed by Mark · B2B Sales Growth Consultant · No Smoke. No Mirrors. Just Execution.

Name / Team: _____

Date Completed: _____

Plan Period: _____

Instructions: Write it in pencil. Plans change — that's normal. The point is to have a clear picture of where you're going and what it will take to get there. Review it monthly. Adjust it when the market tells you to.

01 REST OF YEAR GOALS

Start with the number. Be specific. Vague goals produce vague results.

Revenue Goal — Year End

\$ _____

Gross Profit Margin % Goal

_____ %

Current Year-to-Date Revenue: \$ _____

Revenue Still Needed to Hit Goal: \$ _____

Months Remaining in Year: _____

Revenue Required Per Month to Close the Gap: \$ _____

02 WHERE WILL GROWTH COME FROM?

Be specific. 'Grow everywhere' is not a plan. Pick your growth sources and commit to them.

Growth Source	Est. \$ Contribution	How / Key Actions
Organic growth — existing customers	\$ _____	
New customers — net new logos	\$ _____	
New markets — segments or geographies	\$ _____	
New products or services	\$ _____	

03 IDEAL CUSTOMER PROFILE

Know exactly who you are selling to. If everyone is your customer, you have no strategy.

List your top 5 ideal customer types. These are the buyers who need what you do, value what you deliver, and can afford to pay for it. Estimate the % of your revenue you expect from each type this year.

#	Ideal Customer Type / Description	Est. % of Revenue This Year
1		%
2		%
3		%
4		%
5		%

04 PIPELINE PLAN

A goal without a pipeline is a wish. You need 3x your revenue goal in active opportunities to hit your number.

Take your desired year-end revenue goal and multiply it by 3. That is the minimum pipeline you need to build and maintain.

Desired Year-End Revenue Goal \$ _____	× 3	Pipeline You Need to Build \$ _____
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Current Pipeline Status

Total value of active pipeline today: \$ _____ # of active open opportunities: _____

Pipeline gap (3x goal minus current pipeline): \$ _____ Oldest open quote in pipeline (days old): _____

If your pipeline today is less than 3x your goal — building pipeline is your #1 priority. Not proposals. Not customer visits. Pipeline.

05 STRATEGY

Strategy is not a vision statement. It is a clear answer to: what problem are we solving, for whom, and how are we better than the alternatives?

What Are the Top 3 Challenges Your Customers Face Today?

Think about what keeps your best customers up at night. What business problems are they trying to solve when they call you?

1. _____

2. _____

3. _____

What Are the Top 2 Constraints Your Customers Face Today?

Constraints are different from challenges. Think: budget cycles, staffing limits, regulatory requirements, time pressure, supply chain issues — things that limit what they can do, even when they want to.

1.

2.

06 VALUE PROPOSITION

This is why a customer chooses you over everyone else. It should be specific, provable, and written in the customer's language — not yours.

Using what you know about your ideal customers and your genuine strengths, write your core value proposition below. Then write one specifically tailored to each of your 5 ideal customer types above.

Your Core Value Proposition — For Your Ideal Customers

We help _____ who struggle with _____ by _____ so they can

In your own words:

Value Proposition by Ideal Customer Type — Write One for Each

Go back to Section 3. For each of your 5 ideal customer types, write a value proposition that speaks directly to their specific challenge or constraint. One or two sentences is enough. Make it specific.

Customer Type 1: _____

Customer Type 2: _____

Customer Type 3: _____

Customer Type 4: _____

Customer Type 5: _____

07 KEY ACCOUNT PLAN

These are the accounts that represent approximately 75% of your net income. Every one of them needs a growth plan and a revenue goal — not just a relationship.

List your key accounts below. Set a revenue goal for each. Assign a date by which you will have a written account growth plan. If an account does not have a plan, it does not have a future — it has a relationship.

#	Account Name	Revenue Goal	Account Growth Plan Date	Notes
1		\$	Date:	
2		\$	Date:	
3		\$	Date:	
4		\$	Date:	
5		\$	Date:	
6		\$	Date:	
7		\$	Date:	
8		\$	Date:	
9		\$	Date:	
10		\$	Date:	
11		\$	Date:	
12		\$	Date:	
13		\$	Date:	
14		\$	Date:	
15		\$	Date:	

Key Account Revenue Total: \$ _____

% of Year-End Revenue Goal Covered by Key Accounts: _____ %

Accounts without a growth plan yet: _____ (names or count)

08 NET NEW ACCOUNT PLAN

New accounts are not a bonus — they are insurance. Every business loses customers. New accounts are how you grow despite that.

New Account Revenue Math

What is your average revenue from a new account in the first 6 months?	\$ _____
Based on that average, how many new accounts do you need to hit your year-end plan?	_____ accounts
How many of those new accounts are already in your pipeline?	_____ accounts
How many new accounts do you still need to find and open?	_____ accounts

If the number of accounts you still need to find is more than 2 or 3, prospecting is not a nice-to-have this quarter. It is your job.

09 WEEKLY & MONTHLY BEHAVIORS

Revenue is the result. Behaviors are the cause. Track the activities that produce the outcome — not just the outcome.

Set your weekly and monthly behavior targets. These are the non-negotiable activities that give you the right to expect results. If you are not hitting your targets, start here — not at the revenue line.

Behavior	Weekly Target	Monthly Target
How many meetings (in-person, phone, virtual) will you hold with prospects and customers?	_____	_____
How many quotes / proposals will you send?	_____	_____
What is your current deal close rate? _____ % Target close rate: _____ %	_____	_____

Additional Behavior Commitments

How many referral requests will you make each month?

How many existing accounts will you call or visit proactively each month?

How many lost or dormant accounts will you re-engage each quarter?

Plan Review Cadence

A plan you never review is a document. A plan you review monthly is a competitive weapon.

Monthly

Review pipeline, behaviors, and revenue gap. Adjust tactics.

Quarterly

Assess strategy, team performance, and whether the plan still reflects market reality.

Immediately

When the market shifts. When a key account changes. When a competitor makes a move.

Need help building or pressure-testing this plan?

Schedule a call with Mark. Bring this plan. We will work through it together.



Book Your Call: <https://calendly.com/markrobertssaleseffectiveness/discovery-call>

No smoke. No mirrors. 40 years. 250+ salespeople trained. Just execution.