

Sample Plan

2024 Midyear Sales & Marketing Plan

Ultimate Outcomes for 2024 (goals)

- Ultimate Income Goal: \$200,000
- Great Goal: \$149,000
- Good Goal: \$120,000
- Complete my baseline scripts
- Create a Sales & Marketing System that works for me.

Annual revenue projections (sales results)

- Ultimate Gross Sales: \$388,000
- Great: \$332,000
- Good: \$267,000

Annual Marketing Strategy (marketing tactics)

- Create my Digital Marketing program and implement it no later than August 30th.
- Develop communication channels:
- Webinars Website LinkedIn
- Email Campaign Drip Communication Campaigns Educational Seminars
- Define networking circles (networking at a higher level)
- Find new products
- Annual Projects
- Continue modifying Salesforce to fit my needs
- Complete website
- Define each step and complete within sales funnel
- Complete Scripts based on newly defined sales funnel

June Ultimate Outcomes

Gross Sales: \$3,950

Sales Strategy

- 15 New Prospect Contacts per day
- 10 Presentations per week
- Reconnect with existing prospects.



Marketing Strategy

- Find networking groups that address targeted verticals
- Join Economic Development Corporation (EDC) of Southwest California
- Update LinkedIn
- Projects
- Scripts
- Presentation
- Referral
- Define website layout and style guide
- Sales Funnel: Define steps and complete by end of month
- Salesforce: Define follow up program and tracking (figure out how to create daily contact list)

(Continue on for the rest of the year. I am just showing a sample of the plan.)