



## The 7 step sales strategy that will 3x your revenue

### Description

Stop chasing random leads. This step-by-step guide shows you how to build a simple, powerful sales strategy that aligns your team and crushes your revenue goals.

### Introduction: From working hard to working smart

As a founder, you know that nothing happens until something gets sold. But are you just “winging it,” or are you following a clear, intentional plan? A documented sales plan is the difference between simply working hard and strategically working smart.

The data on this is undeniable:

- Companies with a formal sales plan are **33% more likely to be high-performers.** (Source: Harvard Business Review)
- According to research from Gartner, **65% of a company’s business comes from existing customers**, a fact that a good sales plan builds into its strategy.
- As **Verne Harnish** stresses in *“Scaling Up,”* a disciplined “Execution” plan is a non-negotiable part of growing a business, and a sales plan is the heart of that execution.

A great sales plan isn’t a complex, 50-page document. It’s a simple, living roadmap that gives your team clarity, focus, and a direct path to hitting your targets. This guide will show you how to build one.

### 1. Define your mission & sales goals

Before you can build a plan, you need a destination. Your sales plan should start with a clear, high-level mission for your sales team. Then, break that mission down into specific, measurable goals.

- **High-Level Mission:** To become the #1 provider of accounting software for freelance creatives in our region.
- **SMART Goals:** Use the SMART (Specific, Measurable, Achievable, Relevant, Time-bound) framework.
  - **Example Goal:** Generate \$200,000 in new B2B contracts in Q4.



## 2. Identify your target customer (ABC Analysis)

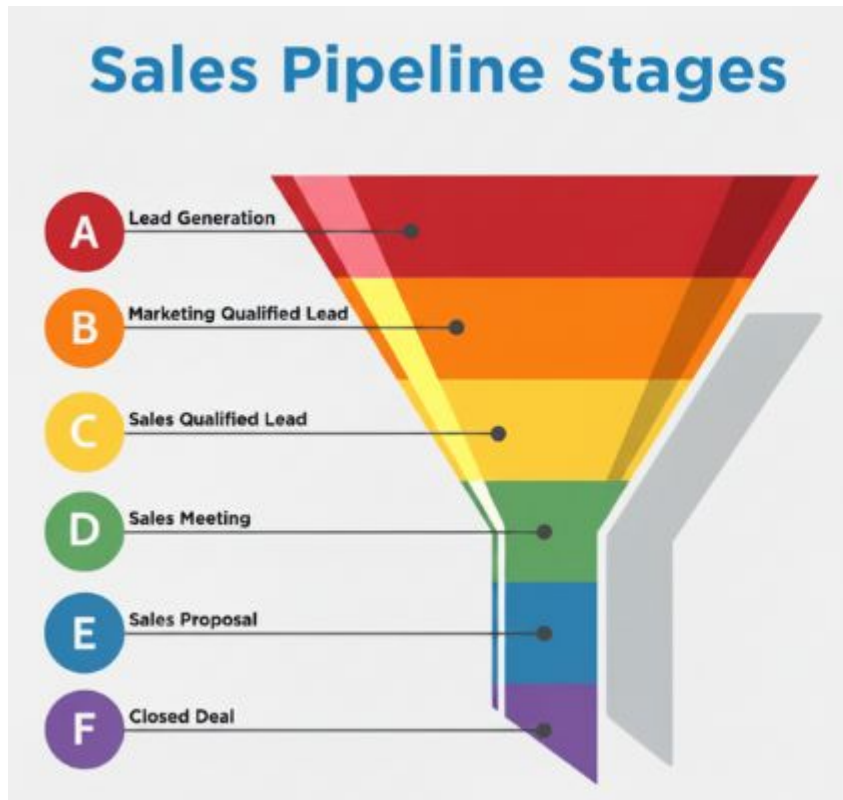
You cannot sell to everyone. A key part of your sales plan is defining exactly who your [ideal customer](#) is. A powerful method for this is the **ABC Analysis**, which involves segmenting your customers based on their revenue potential.

Customer Tier	Description	Action
<b>A Customers</b>	Your top 20% of customers generate 80% of your revenue.	Focus your primary sales and account management efforts here.
<b>B Customers</b>	The next 30% of customers generate 15% of revenue.	Serve efficiently, perhaps with automation or a junior sales rep.
<b>C Customers</b>	The bottom 50% of customers account for only 5% of revenue.	Serve through low-cost, automated channels. Do not over-invest here.

## 3. Establish your sales rhythm (The LAPS Model)

A sales rhythm creates predictability. A classic model is **LAPS (Leads-Appointments-Presentations-Sales)**. It's a simple ratio that helps you understand the activity required to hit your goals. A common starting ratio for B2B sales is **50-6-5-1**:

For every **1** sale you want to make, you need **5** presentations, which requires **6** appointments, which requires **50** qualified leads.



#### 4. Outline your sales process improvements

This section details the specific actions your team will take to improve its efficiency.

- **Create a Sales Kit:** Have a ready-to-go folder with your company overview, case studies, testimonials, and pricing.
- **Standardize Your Offers:** Reduce the number of options in your proposals. Simpler choices make it easier for customers to say "yes."
- **Use a Sales Script:** Create a simple script with key talking points and questions for discovery calls to ensure a consistent, high-quality approach.
- **Analyze Your Calls:** Use tools like [Otter.ai](#) or [Firefly.ai](#) to record and transcribe sales calls. This allows you to study what your best salespeople are doing and use it to train the rest of the team.

#### 5. Define your team structure & roles

A sales plan is useless without clear ownership. This section defines who is responsible for each part of the sales process, from the founder to a fully scaled team.

## The Solo Founder Stage

When you first start, **you are the entire sales team**. You are the SDR, the AE, and the Account Manager. It's crucial to acknowledge this and block out time on your calendar for each of these distinct roles, even if you're the only one doing them.

## Building a Specialized Sales Team

As your business scales, you can't do it all. You'll need to hire specialists for each stage of the sales funnel. A typical modern sales team structure looks like this:

- **Sales Development Reps (SDRs): Your Hunters**
  - **Primary Focus:** Generating new leads and qualifying them.
  - **Daily Tasks:** They spend their time on cold outreach, sending personalized emails, making initial calls, and qualifying prospects to see if they are a good fit for the business. They don't close deals.
- **Account Executives (AEs): Your Closers**
  - **Primary Focus:** Closing deals.
  - **Daily Tasks:** AEs take the qualified leads from the SDRs and manage the rest of the sales process. They run product demos, send proposals, negotiate terms, and ultimately, get the contract signed.
- **Account Managers (or Customer Success Managers): Your Farmers**
  - **Primary Focus:** Retaining and expanding existing customer accounts.
  - **Daily Tasks:** Once a deal is closed, the Account Manager takes over the relationship. Their job is to ensure the customer is happy and successful, which leads to renewals and upsells.

## The Leadership Team (As You Scale)

As your company grows beyond a dedicated sales team, you will build a leadership team. While not all are in the sales department, their roles are critical to the sales plan's success:

- **CEO (Chief Executive Officer):** The leader who sets the company's overall vision and strategy. The sales plan must be in perfect alignment with the CEO's goals.
- **COO (Chief Operating Officer):** The leader of operations. The COO ensures that the company can actually deliver on the promises the sales team makes.
- **CFO (Chief Financial Officer):** The financial leader. The CFO sets the budget for the sales team and analyzes the profitability of the deals they bring in.
- **CTO (Chief Technology Officer):** The technology leader. The CTO is responsible for the product itself, ensuring it's reliable and meets the needs of the customers the sales team is targeting.



## 6. Set your budget and resources

What resources do you need to achieve your sales goals? Your sales plan must outline the budget.

- **Team Costs:** Salaries and commissions.
- **Tools:** CRM software, sales intelligence platforms, etc.
- **Training:** Budget for ongoing sales training.
- **Travel & Entertainment:** If applicable.

## 7. Define your key sales KPIs

You can't improve what you don't measure. Your plan must identify the handful of Key Performance Indicators (KPIs) you will track.

- **Lead Velocity Rate (LVR):** This is a crucial forward-looking metric that measures the month-over-month growth of your qualified leads. For example, if you had 100 qualified leads last month and 120 this month, your LVR is 20%. A high LVR is a strong predictor of future revenue growth.
- **Conversion Rate:** The percentage of leads that become customers.
- **Average Deal Size:** The average revenue from a closed deal.
- **Sales Cycle Length:** The average time it takes to close a deal.

“Always be closing.” This classic sales mantra is well-known, but a better modern mantra is “Always be helping.” HubSpot

## A real-world example in action

Take a small B2B consulting firm. They felt busy, but their revenue was flat. By creating a simple one-page sales plan, they identified their ideal customer (mid-sized tech companies) and focused all their efforts on LinkedIn outreach. They set a clear goal of signing five new clients per quarter. **The result:** In six months, they stopped wasting time on unqualified leads and increased their revenue by 40%. That is the power of a plan.

## A simple one-page sales plan template

Use this simple template as a starting point. Fill in each section with a few clear bullet points.

Section	Your Plan
<b>Mission Statement</b>	Our sales team’s primary purpose is
<b>Target Customer (ICP)</b>	We sell to [Industry], [Company Size] companies that struggle with [Pain Point].
<b>SMART Goals (This Quarter)</b>	• Achieve [Specific Revenue Target]- Acquire [Number] of new customers
<b>Key Tactics &amp; Activities</b>	• Lead Gen: [Tactic 1]- Qualification: [Tactic 2] • Closing: [Tactic 3]
<b>Team Roles</b>	• [Name/Role]: Responsible for [Task] • [Name/Role]: Responsible for [Task]
<b>Key KPIs to Track</b>	1. Conversion Rate 2. Average Deal Size 3. Sales Cycle Length 4. Orders 5. Appointments

## Final Thoughts

A sales plan is more than just a document—it’s a commitment to a process. It brings clarity to your team, discipline to your activities, and predictability to your revenue. It transforms sales from a chaotic art form into a manageable science.

*Start with a simple, one-page plan. Focus on the key elements: your goals, your customer, your process, and your metrics. Review it monthly, and don’t be afraid to adapt it as you learn what works.*

Ready to build a strategy that drives your sales? Start by using our professional [Business Plan Template](#) to define your market and your goals.

## Frequently Asked Questions (FAQs)

- **How often should I update my sales plan?**

Review it monthly and do a major update quarterly. Your sales plan should be a living document that adapts to market changes.

- **What if I'm a solo entrepreneur? Do I still need one?**

Absolutely. A sales plan is even more critical when you're on your own. It's your personal roadmap for staying focused and accountable.

- **What's the most important part of a sales plan?**

The most important part is having a crystal-clear definition of your Ideal Customer Profile (ICP). If you are targeting the wrong people, nothing else in your plan will work.

- **Should I use a CRM?**

Yes. While you can start with a spreadsheet, a simple CRM (like HubSpot's free version) will save you an enormous amount of time and provide valuable insights as you grow.

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