

Annual Sales Plan (Undated)

Salesperson / Team

Enter name

Year / Period

Enter period

Prepared By

Name

Annual Sales Goals

Metric	Annual Target	Notes
Total Sales Revenue (\$)		Notes
Number of New Clients		Notes
Repeat Sales (%)		Notes
Product/Service Mix	Details	Notes

Key Strategies

List primary strategies for achieving your goals (e.g., prospecting, upselling, relationship building)

Quarterly / Monthly Milestones

Period	Sales Target	Key Actions
Q1 / Month 1-3	Target	Key Actions
Q2 / Month 4-6	Target	Key Actions
Q3 / Month 7-9	Target	Key Actions
Q4 / Month 10-12	Target	Key Actions

Top Prospects / Accounts

Account / Prospect	Potential Value	Next Steps
Name	Value	Action
Name	Value	Action
Name	Value	Action

Notes & Additional Actions

Add any notes or additional steps to ensure annual success