

SaaS Sales Plan Structure

1. Executive Summary

Summary of your plan...

2. Target Market & ICP

Ideal Customer Profile:

Describe your ICP...

Key Industries / Segments:

List industries/sectors...

3. Sales Goals & KPIs

Revenue Target:

e.g., \$xxx,xxx per quarter

Monthly Quota:

e.g., \$xx,xxx or xx new logos

Other KPIs:

- e.g., Calls per week
 - e.g., Meetings booked
 - e.g., Pipeline generated
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4. Lead Generation & Prospecting Strategy

Outbound Approach:

Describe your outbound tactics...

Inbound & Marketing Collaboration:

Collaboration points with marketing...

5. Sales Process Steps

1.
Step 1: Prospecting/Discovery
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2.
Step 2: Qualification/Needs Assessment

3.

Step 3: Demo/Presentation

4.

Step 4: Proposal/Negotiation

5.

Step 5: Closing/Won

6.

Step 6: Handover/Onboarding

6. Tools & Resources

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CRM platform...

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Sales enablement tools...

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Content library...

7. Training & Development

Areas for improvement...

Planned workshops/courses...

8. Review & Reporting

Check-in Frequency:

e.g., Weekly, Bi-Weekly

Reporting Metrics:

Metrics to track for review...
