



Sales and Marketing Planning: Template

The following are designed to get you thinking along the “right” lines. It may not be necessary to answer every one of the questions posed (there is overlap) and you may think of your own questions as you go. It is probably best to start with a **specific client** and **product/service** in mind.

1. Who am I speaking to?

- Decision Maker – “Influencer”
- Position/Status
- Family Circumstances
- Financial Wellbeing
- Single Client/ Group of Clients
- Describe you “target” clients in as much detail as possible?

2. What reaction do I want them to have?

- What do I want them to say about me?
- What do I want them to say about my services?
- What do I want them to say about the product I am offering?
- How will I respond to various reactions?

3. What context do they operate in?

- Review your description of your client/s
- How do they communicate?
- What “language/jargon” do they use and understand?
- What is their communication “style” (short and sharp; long winded and verbose; etc)?
- How can I state my “sales pitch” in language and jargon that they understand?
- How can I match my communication to their communication style?

4. What solutions do I have at my disposal?

- Look again at the products/ services you are wanting to sell or market.
- What specific value do they add to your clients?
- Do you believe in them?
- Why are you selling them – specifically to this/these client/s?
- What are the unique feature/s of this product or service.
- Phrase these in a way that will elicit the desired reaction from the client – matching the language/jargon and communication style of the client.

5. Where do I begin?

- Identify clearly the first step that you will take.
- Identify the other steps – in a “flexible” order.
- Think through how you will measure your progress with the client and assess which steps to take next.