Scenario Name

Date

SALES PRIMER

1 Goal

Revenue Target: $

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Average Deal Value: $

=

Target Deal Volume

Scenario Timeframe (in months)

2 Process

Tactics	# of Leads
TELEPHONE CAMPAIGNS	
EMAIL CAMPAIGNS	
TRADE SHOWS | WEBINARS	
SOCIAL MEDIA CAMPAIGNS	
PAID DIGITAL AD CAMPAIGNS	
SEO OPTIMIZATION	

# of Leads (Projected)	# of Leads (Required)

Sales Process

Servicing

Conversion Ratios	%	%	%	

	Lead Generation	Marketing Leads	Sales Qualified	Opportunity	Deals	Customers
Total Stage Targets						
Weekly Avg Totals						

3 Effort

4 Team

5 Budget

Labour

RESOURCE	#REQUIRED	AVG. MONTHLY COMPENSATION	SCENARIO BUDGET
Sales Development Rep (Lead Qualification)			
Account Executive (Deal Close)			
Service Reps | Account Executives			
Marketing Coordinator			
Outsourced Labour (Marketing)			
Manager | Supervisor			
Total Scenario Budget (Approximated)			

Sales & Marketing Expenses

RESOURCE	SCENARIO BUDGET
Lead List Acquisition	
CRM Software	
Sales Collateral	
Events (Trade Shows, Webinars)	
Travel & Accommodation	
Website Design | Maintenance	
SEO Optimization	
Digital Content Creation	
Paid Advertising (Digital)	
Paid Advertising (Traditional)	
Total Scenario Budget (Approximated)	

Total Budget