

Model of sales prospecting plan

To help you establish the sales prospecting plan adapted to your development, Appvizer provides you with a template. It's up to you to complete it!

appvizer

WORK SMARTER

Prospecting objectives

Reminders:

- Setting goals brings meaning and consistency to the actions of your prospecting campaign.
- Set SMART goals in line with your business strategy.

Objective n°1

Name of the objective:

Nature of the objective: qualitative/quantitative

Expected result:

Role of the objective in supporting the business strategy:

Deadline for completion:

Target deadline: DD / MM / YYYY

Responsible for achieving the goal:

Objective n°2

Name of the objective:

Nature of the objective: qualitative/quantitative

Expected result:

Role of the objective in supporting the business strategy:

Deadline for completion:

Target deadline: DD / MM / YYYY

Responsible for achieving the goal:

Objective n°n

Name of the objective:

Nature of the objective: qualitative/quantitative

Expected result :

Role of the objective in supporting the business strategy:

Deadline for completion:

Target deadline: DD / MM / YYYY

Responsible for achieving the goal:

Targets of the prospecting campaign

Reminder: Segmenting your prospects helps you focus on the prioritized prospect profiles.

Target n°1

Target type: B2B / B2C / B2B2C

Profile type:

- age range:
- sex:
- geographical area:
- medium budget:
- role in the company (if it's B2B):
- activity area:
- need(s):
- common objections to be handled:

Target n°2

Target type : B2B / B2C / B2B2C

Profile type:

- age range:
- sex:
- geographical area:
- medium budget:
- role in the company (if it's B2B):
- activity area:
- need(s):
- common objections to be handled:

Action plan

Prioritize channels

Enter here the prospecting channels chosen to fulfill each objective, among your choice: website, emailing, social networks, trade shows, etc.

Do not hesitate to combine several channels for the same purpose. For example, a telephone prospecting interview + a targeted email.

Channel for objective n ° 1:

Channel for objective n ° 2:

Channel for objective n ° n:

Create the prospecting file

If you don't already have one, create your prospecting file to collect all the information from the prospects you are about to contact.

If you already have one, make sure it meets your goals and targets for this campaign.

Define a budget

Budget allocated to carry out objective n ° 1: \$X, XX, including:

- \$X, XX for [intended use]
- \$X, XX for [intended use]
- \$X, XX for [intended use]

Budget allocated to carry out objective n ° 2: \$X, XX, including:

- \$X, XX for [intended use]
- \$X, XX for [intended use]
- \$X, XX for [intended use]

Budget allocated to carry out objective n ° n: \$X, XX, including:

- \$X, XX for [intended use]
- \$X, XX for [intended use]
- \$X, XX for [intended use]

Choose tools and methods

Selected prospecting techniques:

- telephone prospecting
- field prospecting
- email prospecting
- SMS prospecting
- social media prospecting
- prospecting during professional events
- purchase or rental of a prospect database
- others : (*specify*)

Tools available for sales teams to achieve their objectives:

- lead generation software: (*specify*)
- CRM software: (*specify*)
- marketing automation software: (*specify*)
- prospecting file
- model of Excel prospecting file
- others: (*specify*)

If you are still looking for the tool that meets your specific needs to perfect your prospecting, consult our [customer relationship management software](#) library.

Planning of prospecting actions

Tips: divide your goals into actionable tasks to better track the achievement of your goals.

Objective n°1: to be done before DD/MM/YYYY			
Task to do	Criticality	Responsible	Deadline
Task 1			
Task 2			
Task 2			

Measure KPIs and campaign profitability

Tip: set indicators for intermediate deadlines to keep control of the progress of your goals.

Indicators used to measure the success of the prospecting:

- turnover generated,
- new customers part in your portfolio,
- number of new customers per sales representative,
- number of new customers by geographic area,
- a percentage of hot prospects to revive and convert,
- others : (*specify*)