



**7 Steps to Build a
Successful
Sales Strategy
Checklist**

**Liz Heiman
Chief Sales Strategist
Regarding Sales**



Re:Sales



Regarding Sales

Sales Strategy Checklist

Meet the Author



Now more than ever, crafting an effective sales strategy is a challenge. The sales landscape has never been as complex or dynamic as it is today.

You need a strategy, and I am here to help. We designed the *Sales Strategy Checklist* to help you get started building your sales strategy.

With this checklist, you can begin to pull together the information you need to create the plan you want.

Happy Strategizing,



Need help getting started?

Schedule a 30-minute sales strategy session with me.

[Schedule Here](#)



Sales Strategy Checklist

STEP 1: Assess Where You Have Been

- Assess what you did last year including, how much you sold, who sold it, who they sold it to, how profitable it was, how long the sales cycle was.
- List the things that have changed that will impact sales this year.
- Position the sales team to grow existing accounts, find new customers like the ones you have, and the kinds of customers you would like to have.
- Determine the most logical place to look for growth? Will you grow existing accounts, leverage referrals, grow in existing or new territories or focus on new product sales.
- Make sure you have marketing and sales resources in place to support the desired growth.

STEP 2: Create a Clear Ideal Customer Profile

- Identify your best customers. Those are the ones that are easiest to work with, spend the most, buy multiple products, are most profitable, continue to buy more each year.
- Make a list of characteristics of those companies that make them your best customers
- Create an ideal customer profile: a list of characteristics that are most important in selecting customers. Use this to narrow your target market.
- Create an ideal client list inside your broader target market

STEP 3: Do a Situational Analysis (SWOT)

- Assess the strengths you have to win the customers you want
- Identify your internal weaknesses and determine if they can be fixed or overcome
- Look for opportunities that the market is presenting for you, especially those that you haven't taken advantage of before
- Consider threats you could face from competition, in the market, in the economy, or from technology changes and make sure you have a plan to address them.

STEP 4: Set a Clear Market Strategy

- Use the information from step one to determine where your focus will be. Be clear about existing vs. new customers, existing vs. new territories, and existing vs. new products.
- Make sure your messaging positions you well with your ideal customer
- Determine where the critical buyers inside your ideal customer are getting information and make sure they can find you there.
- Create campaigns that position you the way you need your customers to see you spark their interest.



Sales Strategy Checklist (continued)

STEP 5: Create Clear Revenue Goals

- Determine how much of your increase in sales will come from growing existing customers vs. new customers. Set a specific number for each.
- Decide on the goals for each territory based on opportunity and resources.
- Set specific sales goals for each sales rep based on their funnel and their skills.
- Establish goals for each product line, including new product lines based on demand.

STEP 6: Develop and Communicate Clear Positioning

- Make a list of the industries you are focused on and what kinds of problems, growth areas, and initiatives they are facing.
- Create a map of each buyer involved in a purchase and write down how each talks about their problem and what would trigger them to buy. Write messaging around that for each.
- Be clear about how you are positioned relative to the competition and the overall market.

STEP 7: Create a Clear Action Plan

- Make a list of all of the actions that need to take place to achieve the sales goals you just identified.
- Determine who will do it.
- Decide when needs to be done, remembering you can't do it all at once.
- Assign tasks and have check-ins to be sure tasks get accomplished.

If you are ready to take the next step and start building your strategy, download the Sales Strategy Guide



Need help getting started?
Schedule a 30-minute session with Sales Strategist, Liz Heiman.

[Schedule Here](#)

