

One-Page Sales Planning Checklist
The Road Map to Increased Revenue
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- Begin with the end in mind: Create a Sales plan to *drive* revenue
 - Be clear that this sales plan will be used as a road map for the entire company to follow – a plan used every day, not something hidden in a binder
 - This sales plan is for *your* business, not for the bean counters or anyone else
- Start simple. Focus on clearly defined actionable steps for the team to follow
- Begin with a high-level sales projection: plan by business (taproom, self-distribution, wholesalers), plan using annual growth percentages
 - Next, get more detailed and plan by customer/distributor, by brand, by package
 - Look at the process from different angles – by sales person, by market, on/off premise
- Look backward: Use historical 12, 18, 24 month results and volumes to add perspective
- Look forward: Use market trends, and current retail/wholesaler intel to guide projections
- Follow a process: Team, tools, timing
 - Team – Heavily involve those that can influence the number
 - Sales, marketing, admin – they all can make a difference
 - Tools – Use templates, show historical, goals and track against with updates
 - Timing – Start in Q4 for the new calendar year
- Educate, communicate, and repeat
 - Teach your team how the sales plan works, where the numbers come from and how they can make a difference
- Start with a business discussion...that happens to involve numbers
 - Begin the sales plan in words – what do we want to accomplish? Then add in the numbers later...
 - Ask bigger questions: Strategy, goals and objectives
- Don't forget: Expenses to drive revenue
 - Driving sales growth may require investment, additional expenses. List these out, build them into your operating plan