



ORANGE *leaf* CONSULTING

# THE “NO TIME TO PLAN” PLAN

PRESENTED BY  
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# MISSION & PURPOSE

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**What your company's mission statement? What is your primary purpose for doing business in 2021?**

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# GOAL & METRICS

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**What is your revenue goal for the coming year? Your profit goal?**

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**What are at least two additional high-level goals for the coming year?**  
(i.e., open a new office, hire a sales director, etc.)

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# RESOURCES

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**Marketing Budget:** \_\_\_\_\_  
(i.e., website, advertising, social media, etc.)

**Sales Budget:** \_\_\_\_\_  
(i.e., client events, sales materials, etc.)

**Training Budget:** \_\_\_\_\_  
(i.e., sales training, professional development for staff, etc.)

**Other Budget:** \_\_\_\_\_  
(What other budgets do you need to set?)

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## MINI S.W.O.T.

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**Define your organization's position in the market by identifying its...**

**Strengths:** \_\_\_\_\_

(i.e., current market share leader, recognized innovator, etc.)

**Weaknesses:** \_\_\_\_\_

(i.e., declining revenue trends, staff turnover, etc.)

**Opportunities:** \_\_\_\_\_

(i.e., competitor departures, population growth in market, etc.)

**Threats:** \_\_\_\_\_

(i.e., pending legislation, arrival of new competitors, etc.)

## TARGET LIST

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**List your Top 10 sales targets, vertical groups, or industries, in priority order, and what percentage of business you want to get from each one. (i.e., % for residential, % for commercial, etc.)**

**Note: as homework, you will want to actually list your individual targets for each section.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## ACTION STEPS & TIMELINE

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Define the action steps needed to achieve the high-level goals you defined earlier.

**Action Step 1:**

**PEOPLE** (Recruiting, training, succession planning, etc.)

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Completed by: \_\_\_\_\_ Budget Required: \_\_\_\_\_

**Action Step 2:**

**PROCESS** (Software upgrades, communication, materials, etc.)

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Completed by: \_\_\_\_\_ Budget Required: \_\_\_\_\_

**Action Step 3:**

**PROGRESS** (New offices, capital investment, growth expenditures, etc.)

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Completed by: \_\_\_\_\_ Budget Required: \_\_\_\_\_

**Action Step 4:**

**PROMOTION** (Marketing, events, sales materials, etc.)

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Completed by: \_\_\_\_\_ Budget Required: \_\_\_\_\_

## EVALUATION & FOLLOW-UP

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Action Step 1:  Completed?  Repeat for next year?  Modify? \_\_\_\_\_

Action Step 2:  Completed?  Repeat for next year?  Modify? \_\_\_\_\_

Action Step 3:  Completed?  Repeat for next year?  Modify? \_\_\_\_\_

Action Step 4:  Completed?  Repeat for next year?  Modify? \_\_\_\_\_

### Grow BIG or Go Home!

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