



Strategic Planning Guide

How to create a one-page strategic plan
that **Sales Leaders** will actually use

Craft a clear, measurable, easy to communicate strategic plan

Strategy defines what an enterprise will do to be successful — how it plans to compete and win in its chosen markets or deliver the expected services to the citizen and fulfill its public mission. A strategy is specific for an enterprise, in a specific environment, aiming at a specific objective in a specific point in time. It is that strategy from which you generate strategic plans (and then operational plans) that answers how the enterprise will get there.

At a functional level, strategic planning defines the roadmap for executing the choices and actions required to meet strategic goals that reflect the function's contribution to the enterprise business model and goals.

Once you have structured each element of the strategic planning process, summarize the strategy on a single page (as shown on Page 4).

Chief sales officers should use the one-page plan to communicate across and down the organization where the sales function is, where it is going and how it will get there.

This one-page tool is not intended to be a comprehensive review of your strategic plan. It is an overview of how the sales organization adds value and plans to impact future results in line with corporate objectives.

Key Components of the Strategy on a Page

- 1 Statement of strategy.** Craft a clear, concise and memorable statement that captures the essence of the functional strategy and summarizes the key objectives of your long-term plan.
- 2 State of the function.** Identify five to seven metrics that define the sales organization's current and target health and performance.
- 3 Top urgency drivers.** Specify one to three key trends driving a change in business conditions or commercial engagements.
- 4 Top functional initiatives.** List the five to seven key sales initiatives required for your function to achieve its desired end state. The initiatives should be drawn from your long-term strategic plan.
- 5 Critical assumptions.** Document five to seven critical assumptions or dependencies that underpin the sales function strategy. Where necessary, set metrics and thresholds to indicate when course correction will be necessary.

→ **Build a Strategic Plan You Can Use**

Illustrative Sales Function Strategy on a Page

1 Strategic Mission for Sales Organization

Increase the company's top-line growth by 12% by updating our direct engagement strategy to better meet buyers' expectations and expanding our partner network.

2 State of Sales in 20XX

Top 5 to 7 Metrics Describing Initial State

- Year-over-year growth rate: 8%
- Customer retention rate: 72%
- Multiproduct customers: 28%
- Average deal size: \$1.2 million
- Average sales cycle: 195 days
- Pipeline coverage ratio: 2.6x
- Cost of sales: 5.9%

3 Top Urgency Drivers

1. Macroeconomic uncertainty is constraining our sales budget.
2. Buyers' channel preferences are shifting to virtual engagements.
3. Travel restrictions limit sellers' ability to meet buyers in person.

4 Top Sales Function Initiatives

1. Deploy virtual sales training and enablement to field sellers.
2. Improve e-commerce offerings to reduce overall cost of sales.
3. Reevaluate service tiers to rightsize resource allocation.
4. Create an SDR team to improve lead generation capabilities.
5. Develop buyer enablement to align digital/in-person messaging.
6. Expand key account program to improve cross-sell rates.

5 Critical Underlying Beliefs and Assumptions


1. COVID-19 concerns will persist, requiring virtual engagements.
2. Customers will go online for information before engaging.
3. High-efficiency channels are critical to maintaining margins.
4. Economic shocks will impact small and midsize businesses more acutely.
5. Lead generation difficulties will persist into the new year.
6. Customers' digital expectations will accelerate.

2 State of Sales in 20XX

Top 5 to 7 Metrics Describing End State

- Year-over-year growth rate: 10%
- Customer retention rate: 80%
- Multiproduct customers: 35%
- Average deal size: \$1.5 million
- Average sales cycle: 180 days
- Pipeline coverage ratio: 3.0x
- Cost of sales: 5.5%

Strategy on a Page Template

 Type in the light blue fields to complete the interactive form.

Statement of Your Function's Strategy

State of Sales in

Top 5 to 7 Metrics Describing Initial State

Top Urgency Drivers

Top Sales Function Initiatives

Critical Underlying Beliefs and Assumptions

State of Sales in

Top 5 to 7 Metrics Describing Initial State

Actionable, objective insight

Explore these additional complimentary resources and tools for Sales Leaders:

Research



The Chief Sales Officer

Get actionable insights for forward-thinking sales leaders.

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Tool



Sales Benchmarks and Diagnostics

Identify strengths and gaps to develop a course of action and achieve your goals.

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Research



Reinvent Your Go-to-Market Strategy

Learn three keys to outpace fast-evolving buyer dynamics and accelerate your revenue growth.

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Article



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