

Sales Strategy & Revenue Planning Toolkit

SAMPLE PREVIEW | Illustrative information only

Start with your goal. Build the plan to get there.

This preview shows how a business can work backward from an annual revenue goal to sales targets, pipeline requirements, and accountable actions. Figures are fictional and do not represent a completed customer workbook.

A planning example

Planning input	Illustrative value
Annual revenue goal	\$12,000,000
Average revenue per win	\$80,000
Required wins	150
Illustrative win rate	25%
Opportunities required	600

The planning sequence

- 1. Define the goal.** Set a measurable revenue or market-share objective.
- 2. Translate the goal.** Estimate required wins, opportunity volume, and coverage using your own assumptions.
- 3. Assign accountability.** Allocate targets across territories, branches, or salespeople.
- 4. Build the action plan.** Identify owners, decisions, supporting activities, and review dates.

This is a sample preview, not the editable Excel product. Actual workbook calculations depend on user-entered assumptions.

Example: translating the annual goal

A hypothetical business has a \$12 million annual revenue target and an \$80,000 average revenue per win. That implies 150 wins. At an assumed 25% win rate, approximately 600 qualified opportunities would be needed.

Metric	Example result
Annual revenue target	\$12,000,000
Revenue per win	\$80,000
Wins needed	150
Assumed win rate	25%
Opportunities needed	600

From numbers to decisions

Leadership decision	Example approach
Target customer	Prioritize high-fit customer segments
Pricing / margin	Set a minimum acceptable margin
Delivery capacity	Validate ability to serve forecast demand
Marketing support	Coordinate campaigns with sales targets
Retention ownership	Assign ongoing account responsibility

What the full toolkit includes

The Excel workbook includes Guide, Overview, Goal, Salespeople, Monthly, Strategy, Actions, and Quality Checks worksheets. It is intended to support structured planning and ongoing review.

Purchase price: \$99, one-time. For product details, visit the [Five Needles Consulting Resources & Tools page](#).