



DYNAMIC SALES PLANNING:

Winning Strategies for an Evolving Market

Plus Templates

The dashboard, titled "Sales Planning", is shown in a white frame. At the top right, a circular profile of Tamera Smith, Sales Leader, is displayed. The dashboard includes several key components:

- Quota and Revenue Progress:** Two progress bars on the left show "Quota" and "Revenue" with "Target" and "Remaining" indicators.
- Assigned Accounts Map:** A map of the United States is color-coded by region, with a legend for "Assigned: Accounts, Reps, Postal Codes".
- Milestone Completed:** A notification bubble shows a woman's profile and the text "Milestone Completed" with a green checkmark.
- Line Chart:** A chart displays performance trends over time for three different categories, each represented by a different colored line and a profile picture.
- Plan Hierarchy Table:** A table with columns for "Name", "Quota", and "Headcount". Each row includes a dropdown menu and a progress bar.

A zebra mascot wearing a blue jacket and holding a circular icon with a green upward arrow stands on a path in the bottom right corner. The background features a stylized landscape with mountains, trees, and butterflies.

Introduction

A constantly evolving marketplace calls for continuously evolving sales plans.


Sales planning is most often viewed as an annual project, a singular intensive effort to lay out goals, strategies, and metrics for the year ahead. But in today's fast-paced, continuously shifting market, this traditional view of sales planning is not sustainable. Leading businesses don't just build effective, data-driven sales plans – they update and iterate on those plans to keep pace with the world around them.

But dynamic sales planning is easier said than done. Many organizations struggle to know when, why, and how to iterate on sales plans – and most don't understand what resources or tools they need to do so. In this e-book, we'll explore the core principles of a dynamic sales planning strategy and provide actionable templates for readers to try for themselves.

A donut chart showing 89% completion, with a teal segment and a dark green segment. The percentage '89%' is displayed in the center.

89%

of Sales Ops professionals say conducting sales planning more often would set teams up for greater success in a world that is in constant flux.

A donut chart showing 82% completion, with a teal segment and a dark green segment. The percentage '82%' is displayed in the center.


82%

of sales professionals say Sales and Revenue Ops are critical in growing their business.

A donut chart showing 80% completion, with a teal segment and a dark green segment. The percentage '80%' is displayed in the center.

80%

of companies miss out on 2-7% of revenue due to unbalanced territories, misaligned segments, and quotas.



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1

Best Practices for Dynamic Sales Planning



01

Best Practices for Dynamic Sales Planning

There's no one-size-fits-all strategy for sales planning — the way you approach this complex process depends on your company, industry, products, resources, and more. But, a handful of critical tactics and considerations have emerged as essential elements for any modern sales organization.

Before we take a close look at the key components of sales planning, let's explore five best practices that will help you develop, build, and continuously improve your sales plans.



01

#1

Be clear about your goals up front

Distinct sales goals inform every facet of your sales plans and enable strategic iteration.

Sales plans are dependent on the high-level goals outlined by an organization's leadership. If your overarching goals are vague, this lack of detail will filter down and result in sales plans that look fine on the surface but won't guide your business in the specific direction you want to go. But, if you create distinct, actionable goals and communicate them early in the process, your sales planning process will become more focused and efficient as it works in service of those goals.

Start with the big-picture goals – like how much annual revenue you want your sales organization to deliver. Then, get more detailed. Does your company want to target a new vertical, boost sales to a specific industry, or prioritize selling a certain product or solution? These types of specific big-picture objectives should be communicated clearly in your annual sales plans, as they'll inform the rest of the planning process, from resource allocation to territory carving to quota setting.

Clear goals also enable your sales organization to iterate throughout the year without losing focus of their primary objectives. In the absence of distinct overarching goals, the process of adjusting sales plans is something like changing your route on a long drive without knowing your precise destination. But, when the sales org knows the big targets they're aiming for, they can strategically iterate sales plans in order to hit those targets more effectively.



25%

of an executives' time on average is spent on planning.



31%

of executives feel their sales strategies position them to hit long-term goals.



77%

of employees are more likely to be high performers when their connection to work and level of understanding of goals is higher than when their understanding is low.

01

#2

Take a data-driven approach

Successful sales plans rely more on data and less on guesswork.

In an increasingly complex selling environment, organizations who rely on intuition struggle to create sales plans that consistently work. A data-driven approach enables better decision-making, as plans that are grounded in objective data will minimize risk and help you hit your desired outcomes more efficiently. Simply put, your goals and forecasts become more accurate when you rely on data over instinct.

A data-driven planning approach also helps you make changes beyond your initial sales planning process. If a sales plan isn't delivering the results you wanted, analyzing data will help you determine what needs to be changed and how.

Make sure you're using a variety of internal and external data sources to inform your sales planning process – from your big-picture goals all the way down to individual sales quotas. These data sources should include:

- Historical sales performance and results
- Customer data housed in your CRM
- Market research and trends
- Competitor analysis

You should also consider qualitative data related to customer and seller experience, as they inform your quantitative data with important context that can positively influence your future plans.

Sales professionals say the following processes are hindered by poor data quality:



- Accurate forecasting
- Achievable sales targets and quota-setting
- Equitable territory planning



01

#3

Leverage scenario-modeling to plan for anything

Preparing for adverse scenarios helps you mitigate their consequences.

While you can't predict the future, you can plan for the many unpredictable situations that the future might bring. Scenario-modeling is a sales planning technique in which you create potential scenarios that may happen, consider how they'll impact your company, and determine how you'll respond to them if they do occur.

Start by creating a list of future scenarios that would impact your sales org's ability to hit their goals. Consider a mix of external scenarios – like an event that negatively impacts the economy, or the emergence of a new competitor – and internal scenarios, like a spike in sales turnover, a product selling far below expectations, or a technical problem causing a customer experience crisis.

Leverage historical data to inform your scenarios. For example: if you're modeling a scenario to navigate an economic downturn, look at similar moments you've experienced in the past and analyze how they impacted your business.

For each potential scenario, develop a detailed response plan. Document the specific changes that you'll make to your sales plans in the event that the scenario becomes reality. Of course, you might still encounter situations you hadn't planned for – but that means you'll have more data and experience to inform your next scenario-modeling process.



56% of sales executives see their current sales planning process as a waste of time.



Organizations that take a signal-based approach to revisiting scenario planning are 1.9x more likely to have commercial growth compared to those that do not.



01

#4

Centralize sales plans for cross-functional alignment

Break down data silos and give sellers a unified view of sales plans and results.

Many sales plans falter because of data silos and the breakdowns in alignment that they cause. When every individual sales plan lives in its own silo, sales teams struggle to achieve their shared goals – and iterating sales plans becomes an incredibly convoluted process.

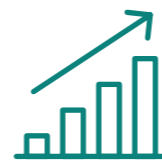
Take the process of territory carving, for example. An AE is assigned a territory, based on a variety of account, industry, and geographic criteria. A number of specialists may then be attached to that AE's territory – including service specialists, customer success managers, and BDRs – and these specialists get assigned to the same accounts as their designated AE.

But what if changes need to be made to that AE's territory? What if they're pulled from certain accounts and assigned to others? If you're operating with disjointed, siloed data, you risk fracturing the unity of that sales team if you fail to make and communicate the same changes to all of their plans.

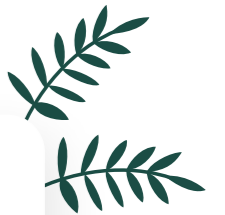
A centralized sales planning process allows for iteration without consequence, as plan changes can be applied to all impacted team members, and everyone has shared visibility into their objectives and progress.



Sales organizations that align cross-functional KPIs are nearly **3x more likely** to exceed new customer acquisition targets.



In organizations where sellers feel truly connected, **performance surges by 24%** and retention grows by **30%**.



01

#5

Adopt continuous improvement cycles

Analyzing and updating sales plans regularly will produce better results.

Some sales leaders make updates to their sales plans throughout the year, but only do so in response to a major issue that rings the alarm bells. Instead of waiting for the flaws in your plans to show, you should proactively analyze your plans and identify areas for improvement.

Set aside time every quarter or month where sales leadership will get together and analyze how sales plans are performing, what targets you're on track to hit, and the areas where you're falling behind on your goals. Determine a course of action for any goal that isn't being met. This might mean reallocating resources from one team to another, adjusting territories, or making changes to sales quotas.

Throughout the year, continue to analyze the evolution of your sales plans and see how the changes you've made have impacted results. And, empower sales managers and their teams to give feedback on sales plans and suggest potential improvements, as their on-the-ground experience may uncover blind spots that leadership isn't aware of.

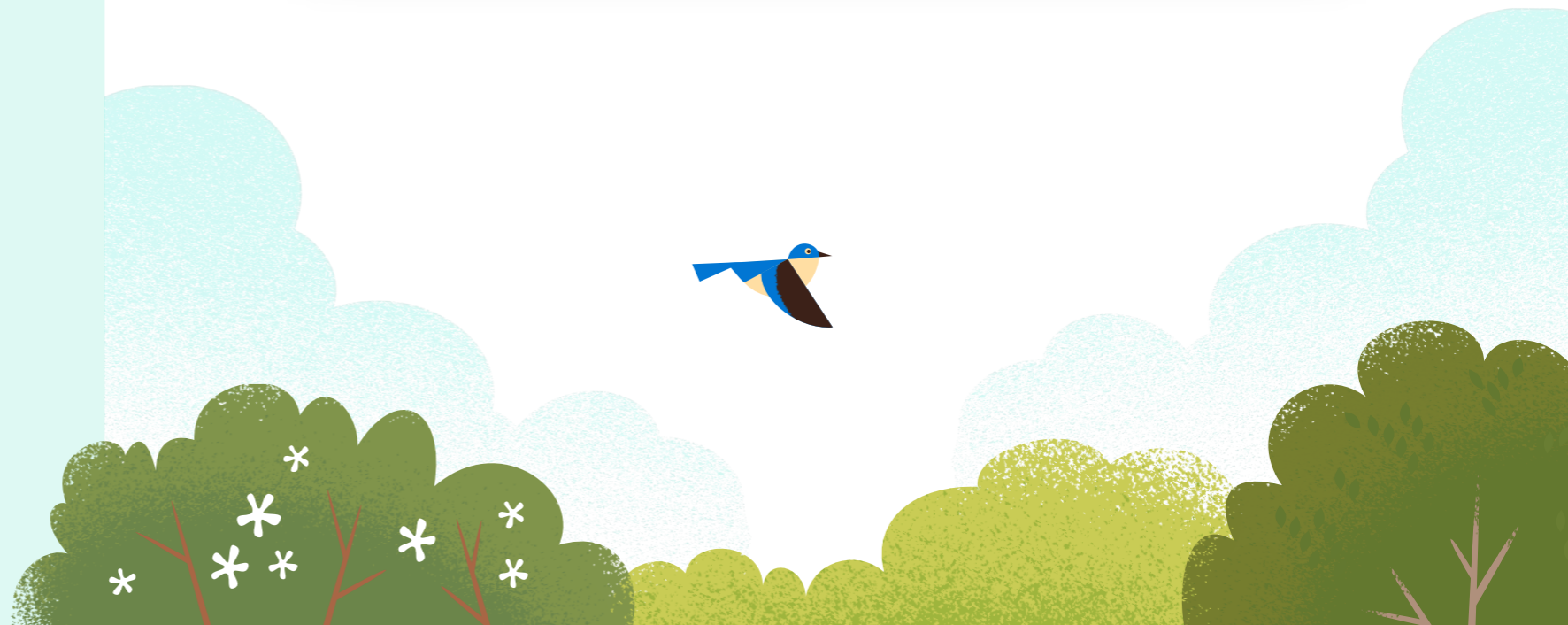


or greater likelihood that strategic plans will need to change after annual planning has concluded.



Two-thirds of Chief Sales Officers

struggle to adapt their strategic plans to a sudden change in business context.



2

Core Functions of Sales Planning (+Templates)



Core Functions of Sales Planning (+Templates)

Sales planning is a complex, multilayered process. In order for sales plans to succeed, all the components of your plans need to work in unison towards achieving the goals you've set. In this section, we'll explore five core functions of sales planning.

Let's look at a quick overview of these core functions and the major differences between them. Then, we'll do a deep dive into each function and provide you with a template you can use within your own planning cycle.

SALES PLANNING			
Core Function	Definition	Key Focus	Outputs
Capacity Planning	Estimating resource needs to meet targets	Headcount, workload, ramp time, quotas	Hiring plans, productivity benchmarks
Coverage Modeling	Allocating resources across segments and channels	Segmentation, resource allocation, ROI	Territory and resource allocation
Org Design	Team structure, responsibilities, and reporting lines	Roles, hierarchy, workflows, efficiencies	Org chart, job descriptions
Territory Carving	Dividing markets into distinct sales territories	Geographic or account-based boundaries	Territory maps and assignments
Quota Building	Assigning revenue and activity targets	Top-down goals, fairness, segmentation	Individual and team quotas



Capacity Planning

Sales capacity planning is the process of identifying and calculating the number and type of sales representatives needed to achieve a given revenue goal. Capacity planning requires you to analyze historical data to predict and plan for how you'll generate the number of deals and the amount of revenue needed to hit your targets as a sales organization.

Key Focus:

- 1 **Headcount:** Estimating the number of reps needed to achieve sales goals.
- 2 **Workload:** Balancing the workload across the team (e.g., number of accounts or leads per rep).
- 3 **Ramp Time:** Factoring in time for new hires to become fully productive.
- 4 **Productivity Targets:** Setting expectations for quota attainment per rep.

Potential Outputs:

- A detailed hiring plan
- Budget requirements for sales personnel
- Productivity benchmarks

Template #1

QUARTERLY				
	Q1	Q2	Q3	Q4
Starting # of reps	20	21	23	26
Expected # of new hires	3	3	4	5
Expected # of churned reps	2	1	1	2
Ending # of reps	21	23	26	29
Fully ramped in quarter (100%)	18	20	22	24
Partially ramped in quarter (50%)	3	3	4	5
Total ramped in quarter	20	22	24	27
Quarterly quota per rep	\$240k	\$240k	\$240k	\$240k
Historical attainment	60%	60%	60%	60%
New ARR generated by team	\$2.8M	\$3M	\$3.4M	\$3.8M



Coverage Modeling

A sales coverage model is a framework that defines how you allocate your sales resources (sellers, tools, and budgets) across different customer segments, products, and channels. Coverage modeling involves segmenting your target buyers and determining how to reach, engage, and sell to each segment most effectively.

Key Focus:

- 1 **Customer Segmentation:** Who to target (e.g., SMB vs. Enterprise).
- 2 **Resource Allocation:** How many reps are assigned to each segment or channel.
- 3 **Engagement Models:** Direct sales, channel partners, or e-commerce.
- 4 **Optimization:** Ensuring resources are deployed where they have the highest ROI.

Potential Outputs:

- A sales territory plan
- Defined resource allocation by segment, product, or channel
- Coverage metrics (e.g., accounts per rep, market penetration)

Template #2

CUSTOMER SEGMENTATION

Segment Name	Description	Revenue Potential	Account Tier	Assigned Reps	Coverage Model
SMB	Small Companies (<\$50M)	\$X,XXX,XXX	Tier 3	5	E-Commerce + Inside Sales
Mid-Market	Mid-Size Companies (\$50M to \$1B)	\$X,XXX,XXX	Tier 2	10	Partner Sales + Inside Sales
Enterprise	Large Companies (\$1B+)	\$X,XXX,XXX	Tier 1	15	Partner Sales + Inside Sales

PRODUCT ALIGNMENT

Product Name	Target Segments	Revenue Goal	Key Selling Points	Assigned Specialists
Product A	Enterprise, SMB	\$X,XXX,XXX	Scalability	2
Product B	Mid-Market	\$X,XXX,XXX	Cost Efficiency	2
Product C	All Segments	\$X,XXX,XXX	Integrations	4

Goal: Maximize sales efficiency and effectiveness by optimizing resource allocation.

Timeframe: [Year/Quarter]

Template #2 Continued

CHANNEL STRATEGY

Channel	Segment Focus	Revenue Share	Key Activities	Tools Allocated
Inside Sales	All Segments	60%	Strategic Acct Management	CRM, Prospecting Tools
Partner Sales	Mid-Market + Enterprise	30%	Co-Selling Programs	Partner Portal
E-Commerce	SMB	10%	Self-Service Sales	Website Chat

BUDGET ALLOCATION

Category	Budget %	Notes
People (Reps)	50%	OTE, Salaries, Commissions
Tools and Technology	25%	CRM, Prospecting Tools, Partner Portal, Analytics
Enablement	15%	Training, Onboarding
Marketing Support	10%	Supplemental ABM Campaigns, Tradeshow Travel, Co-Marketing Initiatives

KPIS & TRACKING

Metric	Target Value	Frequency of Review	Owners
Pipeline Coverage	3x Quota	Monthly	Sales Leadership + RevOps
Segment Penetration	30%	Quarterly	Sales Leadership + RevOps
CAC	<\$XX/Customer	Monthly	All GTM

Goal: Maximize sales efficiency and effectiveness by optimizing resource allocation.

Timeframe: [Year/Quarter]

Org Design

Org design is the process of structuring a sales organization – defining roles, responsibilities, reporting lines, and workflows to align with business goals.

Key Focus:

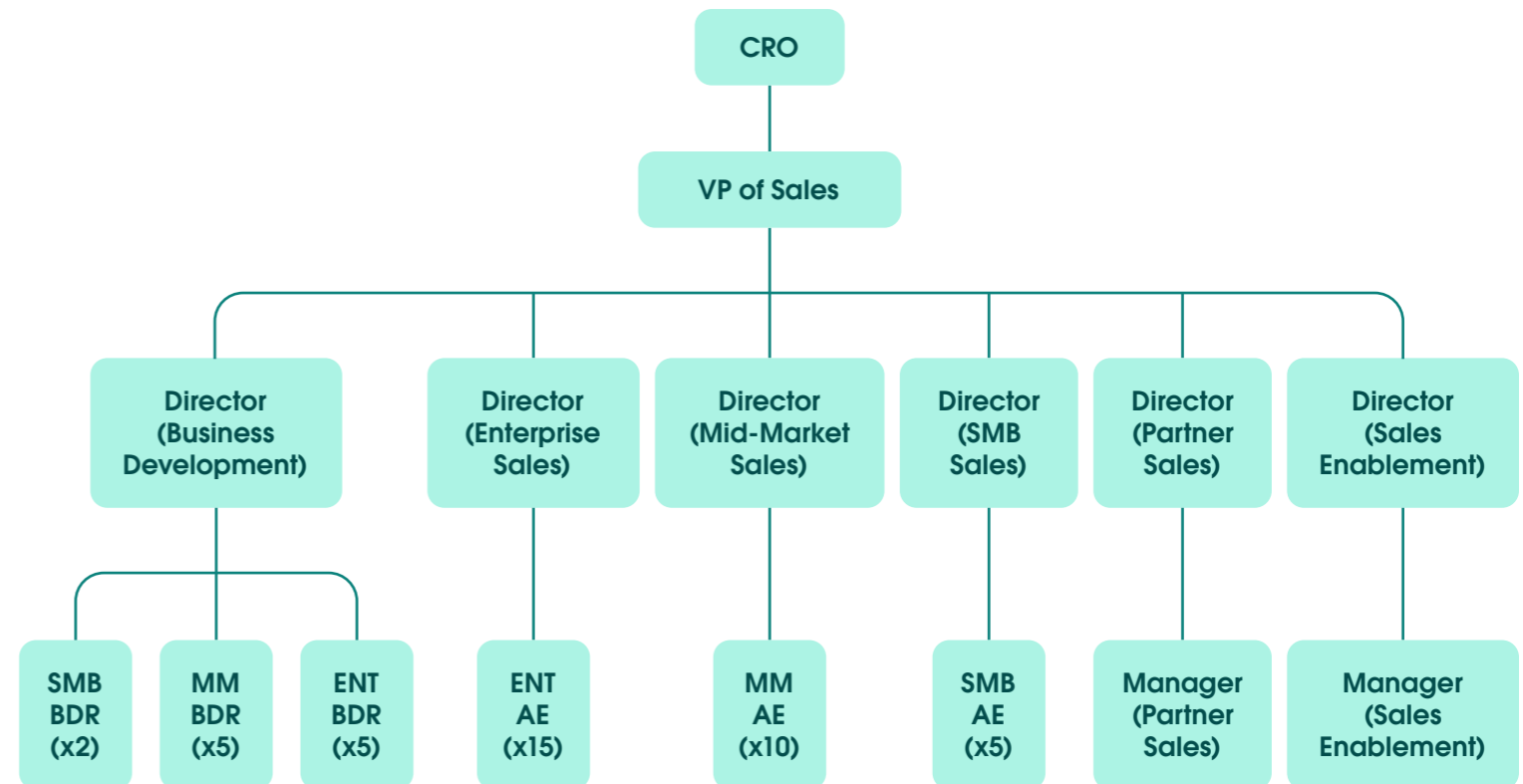
- 1 **Structure:** Hierarchies (e.g., SDRs, AEs, sales managers, etc.).
- 2 **Roles:** Defining specific responsibilities (e.g., hunter vs. farmer roles).
- 3 **Efficiency:** Eliminating redundancies and ensuring smooth coordination.
- 4 **Alignment:** Ensuring the org structure aligns with company strategy (e.g., product focus, geographic expansion).

Potential Outputs:

- Organizational charts
- Defined job descriptions and career paths
- Reporting relationships and accountability

Template #3

ORG CHART



Template #3 Continued

ROLES, RESPONSIBILITIES, & REPORTING LINES				
Role	Responsibilities	Reports To	Reporting Lines and Cross-Functionality	Cross-Functional Workflows
CRO	Set revenue goals, manage VPs, and set high-level strategy.	CEO	Responsible for cross-functional alignment with other C-Level executives and their departments.	
VP of Sales	Set sales strategy, manage directors, and drive toward revenue goals.	CRO	Oversees strategic alignment across all sales segments and functions.	Lead flow and handoff
Director of Enterprise Sales	Lead Enterprise segment strategy and manage Enterprise AEs.	VP of Sales	Manage their respective segment and work cross-functionally with similar level GTM leaders.	Lead flow and handoff Pipeline management
Enterprise Account Executive (AE)	Penetrate target accounts, book meetings, generate pipeline, and close deals within Enterprise accounts.	Director of Enterprise Sales	Partner with respective business development reps.	Lead flow and handoff Pipeline management
Director of Mid-Market Sales	Lead Mid-Market segment strategy and manage Mid-Market AEs.	VP of Sales	Manage their respective segment and work cross-functionally with similar level GTM leaders.	Lead flow and handoff Pipeline management
Mid-Market Account Executive (AE)	Penetrate target accounts, book meetings, generate pipeline, and close deals within Mid-Market accounts.	Director of Mid-Market Sales	Partner with respective business development reps.	Lead flow and handoff Pipeline management
Director of SMB Sales	Lead SMB segment strategy and manage SMB AEs.	VP of Sales	Manage their respective segment and work cross-functionally with similar level GTM leaders.	Lead flow and handoff Pipeline management
SMB Account Executive (AE)	Self source qualified SMB pipeline including upselling and cross-selling qualified e-commerce customers and work qualified inbound inquiries in conjunction with business development team in SMB segment.	Director of SMB Sales	Partner with respective business development reps.	Lead flow and handoff Pipeline management

Template #3 Continued

ROLES, RESPONSIBILITIES, & REPORTING LINES (CONT.)

Role	Responsibilities	Reports To	Reporting Lines and Cross-Functionality	Cross-Functional Workflows
Director of Business Development	Lead business development strategy and process and manage BDRs across all business segments.	VP of Sales	Manage their function and work cross-functionally with similar level GTM leaders.	Lead flow and handoff Lead follow up
Enterprise BDR	Field and qualify inbound inquiries, work leads, book meetings, and partner with AE's to generate and close deals in the Enterprise segment.	Director of Business Development	Partner with respective AE team.	Lead flow and handoff Lead follow up
Mid-Market BDR	Field and qualify inbound inquiries, work leads, book meetings, and partner with AE's to generate and close deals in the Mid-market segment.	Director of Business Development	Partner with respective AE team.	Lead flow and handoff Lead follow up
SMB BDR	Field and qualify inbound inquiries, work leads, book meetings, and partner with AE's to generate and close deals in the SMB segment.	Director of Business Development	Partner with respective AE team.	Lead flow and handoff Lead follow up
Director of Partner Sales	Set strategy for channel sales and manage Partner Sales manager.	VP of Sales	Manage their respective function and work cross-functionally with similar level GTM leaders.	Pipeline management
Manager of Partner Sales	Manage relationships with channel partners, drive revenue through channel partners, and execute on partner enablement.	Director of Partner Sales	Work cross-functionally as instructed by partnership leader.	Pipeline management
Director of Sales Enablement	Set sales enablement strategy and manage Sales Enablement Manager.	VP of Sales	Supports all business segments and sales teams.	Onboarding and training
Manager of Sales Enablement	Create enablement materials to train and equip sales teams with the skills, knowledge, and resources needed to achieve sales goals.	Director of Sales Enablement	Work cross-functionally as instructed by partnership leader.	Onboarding and training

Territory Carving

Territory carving is the process of dividing your market into distinct customer segments – based on criteria like industry, geography, or revenue potential – and assigning them to specific sales teams or reps. The goal of territory carving is to create balanced territories that maximize sales potential, minimize resource overlap, and give each sales team equitable workloads and selling opportunities.

Key Focus:

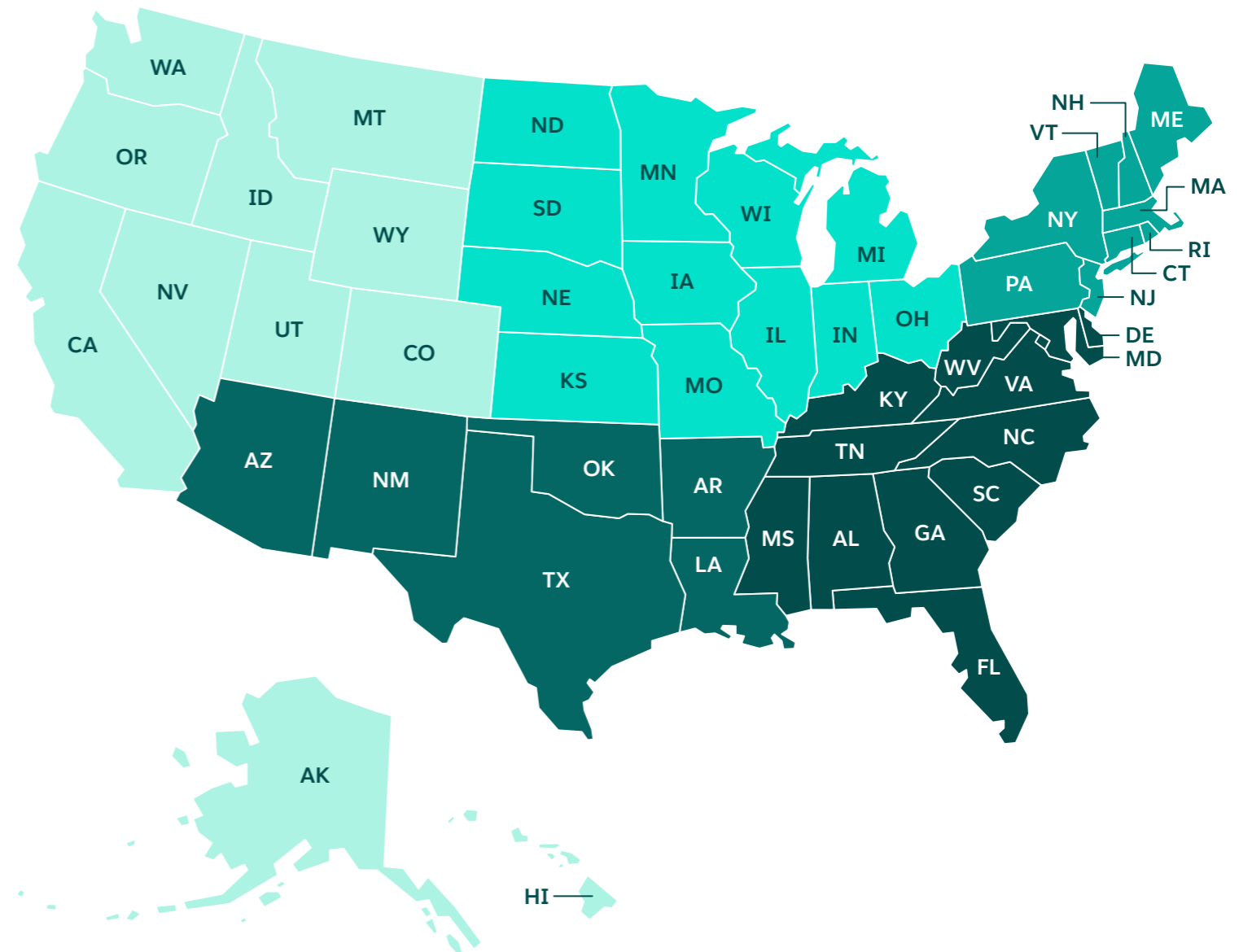
- 1 **Geographic Boundaries:** Creating territories based on physical locations.
- 2 **Account Distribution:** Ensuring equal opportunity (e.g., based on potential revenue or account size).
- 3 **Fairness:** Balancing territories to avoid overburdening or underutilizing reps.
- 4 **Market Coverage:** Ensuring no gaps or overlaps in coverage.

Outputs:

- Detailed maps of territories
- Territory assignments for sales reps
- Rules of engagement to handle boundary disputes

Template #4

TERRITORY MAPS



Template #4 Continued

TERRITORY ASSIGNMENTS					
Territory	Segment	Assigned Reps	Quota	Key Accounts	BDR(s)
Northeast	Enterprise	Sophia Martinez, Ethan Walker, Isabella Parker	\$X,XXX,XXX	Link	Emily Foster
Northeast	MM	Jamie Morgan, Drew Taylor	\$X,XXX,XXX	Link	Avery Quinn
Northeast	SMB	Alex Carter	\$X,XXX,XXX	Link	Casey Parker
Southeast	Enterprise	Ben White, Olivia Gray, Matt Lopez	\$X,XXX,XXX	Link	Charlotte Wells
Southeast	MM	Sydney Blake, Cameron Reed	\$X,XXX,XXX	Link	Chris Ramirez
Southeast	SMB	Jordan Mitchell	\$X,XXX,XXX	Link	Casey Parker
Midwest	Enterprise	William Ray, Jessica Clarke, Travis Taylor	\$X,XXX,XXX	Link	Abby Ross
Midwest	MM	Payton Riley, Dakota Lane	\$X,XXX,XXX	Link	Jamie Jones
Midwest	SMB	Taylor Bennett	\$X,XXX,XXX	Link	Casey Parker
Southwest	Enterprise	Dave Cole, Hannah Peterson, Chris Evans	\$X,XXX,XXX	Link	Lauren Matthews
Southwest	MM	John Smith, Alexis Price	\$X,XXX,XXX	Link	Drew Hawkins
Southwest	SMB	Morgan Hayes	\$X,XXX,XXX	Link	Sammy Thompson
West	Enterprise	Victoria Allen, Andrew Miller, Rachel Adams	\$X,XXX,XXX	Link	Nick Cooper
West	MM	Kendall Rivera, Sarah Campo	\$X,XXX,XXX	Link	Michael Anderson
West	SMB	Riley Brooks	\$X,XXX,XXX	Link	Sammy Thompson

Template #4 Continued

02

RULES OF ENGAGEMENT		
Category	Rule	Details
General Principles	Clarity	Ensure every account, lead, and opportunity is clearly assigned to prevent conflicts.
	Fairness	Distribute opportunities equitably based on territory, segment, and strategic alignment.
	Transparency	Document and communicate rules clearly to all team members.
	Customer-Centricity	Prioritize customer experience when resolving conflicts.
Rules Within Territory	Account Ownership	Accounts assigned based on headquarters location using postal address.
	Lead Routing	Inbound leads routed to the AE covering the territory where the lead is headquartered; unclear leads go to a central queue for review.
	Renewals and Expansions	Account owners maintain rights unless accounts transition to another segment or partnership.
	Quota Allocation	Territories align with quota assignments proportional to market potential.
Handling Ambiguities	Headquarters vs. Regional Offices	Accounts assigned by headquarters; regional offices handled by parent account owner unless reassigned based on revenue or independence.
	Parent/Child Relationships	Parent accounts take precedence; child accounts assigned regionally with collaboration required for global deals.
	Shared Responsibility	Complex accounts marked as 'shared,' with commissions split based on contribution.
Partnership Sales vs. Core Segment AEs	Core AE Ownership	Core AEs own accounts within their territory unless formally transitioned to partnership-focused AEs.
	Partnership Sales Ownership	Partnership AEs handle accounts from partnership leads, referrals, or joint sales motions.
	Collaboration Rules	Core and partnership AEs collaborate on multi-threaded deals, with commission splits predefined and approved.
Dispute Resolution	Conflict Resolution Process	Follow a standardized process: review data, mediate within 48 hours, escalate to RevOps leadership if unresolved.
	Customer First Policy	Prioritize the customer's experience over rigid adherence to rules.
Enforcement and Review	Enforcement	Violations addressed with progressive disciplinary actions.
	Quarterly Review	Review rules and territory alignments quarterly for market and organizational alignment.

Quota Building

Finally, quota building is the process of setting performance targets for each sales rep and team. Each quota consists of measurable objectives that a seller is expected to achieve over a specified time frame, whether monthly, quarterly, or annually. Quota building is a critical process as it outlines what each seller will do to contribute to your company's revenue goals. Your sales quotas should be informed by market conditions, historical performance data, and feedback from managers in order to ensure they're fair, achievable, and aligned with your business priorities.

Key Focus:

- 1 **Top-Down Alignment:** Starting with company revenue goals and breaking them down.
- 2 **Fairness:** Ensuring quotas are realistic and achievable.
- 3 **Segmentation:** Adjusting quotas based on segment potential (e.g., SMB vs. Enterprise).
- 4 **Activity Targets:** Setting metrics like meetings booked or pipeline generated.

Outputs:

- Individual and team quota assignments
- Documentation of quota rationale
- Tracking mechanisms for performance management

Template #5

COMPANY OVERVIEW

Company Revenue Goal:	\$50,000,000 New Business Revenue Target
Time Frame:	Annual quotas, divided into quarterly milestones
Historical Data:	Last year's revenue split: 10% from SMB, 40% from MM, 50% from ENT
Market Insights:	Growth expected in MM (10%) and ENT (10%), with SMB staying stable
Sales Team:	30 AEs: 15 ENT, 10 MM, 5 SMB

QUOTA ALLOCATION BY SEGMENT

Segment	# of AEs	Revenue Target	Annual Quota per AE	Quarterly Quota per AE
SMB	5 SMB AEs	\$5,000,000 (10% of goal)	\$1,000,000	\$250,000
MM	10 MM AEs	\$15,000,000 (30% of goal)	\$1,500,000	\$375,000
ENT	15 ENT AEs	\$30,000,000 (60% of goal)	\$2,000,000	\$500,000

Template #5 Continued

02

QUOTA BREAKDOWN BY QUARTER				
Quarter	SMB Target (5 AEs)	MM Target (10 AEs)	ENT Target (15 AEs)	Company Target
Q1	\$1,250,000	\$3,750,000	\$7,500,000	\$12,500,000
Q2	\$1,250,000	\$3,750,000	\$7,500,000	\$12,500,000
Q3	\$1,250,000	\$3,750,000	\$7,500,000	\$12,500,000
Q4	\$1,250,000	\$3,750,000	\$7,500,000	\$12,500,000

QUOTA METRICS & ASSUMPTIONS			
Metric	SMB	MM	ENT
Average Deal Size	\$50,000	\$100,000	\$250,000
Opps Per AE/Year	80	50	40
Close Rate	25%	30%	20%

ADDITIONAL CONSIDERATIONS	
Adjustments for Market Conditions	SMB quotas may need flexibility based on potential economic fluctuations.
Manager Feedback	Involve team managers to assess quota realism and provide insights into team capacity.
Enablement Support	Provide SMB BDRs with automation tools for high-volume lead management, MM AEs with ABM support, and ENT AEs with executive sponsorships.
Review Cadence	Reassess quotas quarterly to adjust for market dynamics, seasonality, and seller performance.

3

Salesforce's Sales Planning Solution



03

Salesforce's Sales Planning Solution

Reach revenue goals faster with a centralized, flexible sales planning solution.

Structure plans that reflect your organization's goals, automate data entry, and make changes quickly to keep your sellers on track.

[Learn More](#)



Develop map-based territory plans to assess coverage and performance at the team and seller level.



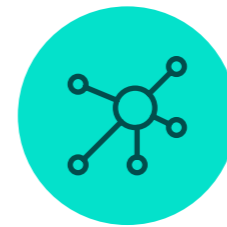
Build new plans and refine existing plans using rich customer data.



Distribute quotas and targets to each team and rep with a few simple clicks.



Visualize team and rep performance in real time to assess the impact and effectiveness of your sales plans.



Manage hierarchies and apply changes based on shifting business priorities.



Final Thoughts

As well-crafted as your initial sales plans may be, today's constantly shifting marketplace calls for a more agile, iterative approach to sales planning.

An intelligent sales planning system that enables flexibility, continuous analysis, and connectivity is a crucial driver of prolonged sales success.

Using the strategies covered in this e-book, you'll evolve your sales planning strategy from a static group of targets and tactics to a dynamic, constantly improving revenue engine. And, with Salesforce's dedicated Sales Planning solution, you'll not only build the most nuanced and data-driven sales plans – you'll also gain the tools and analytical insights you need to adapt your plans to whatever changes you face.



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