Workbook for Annual Sales Planning for the year 2020
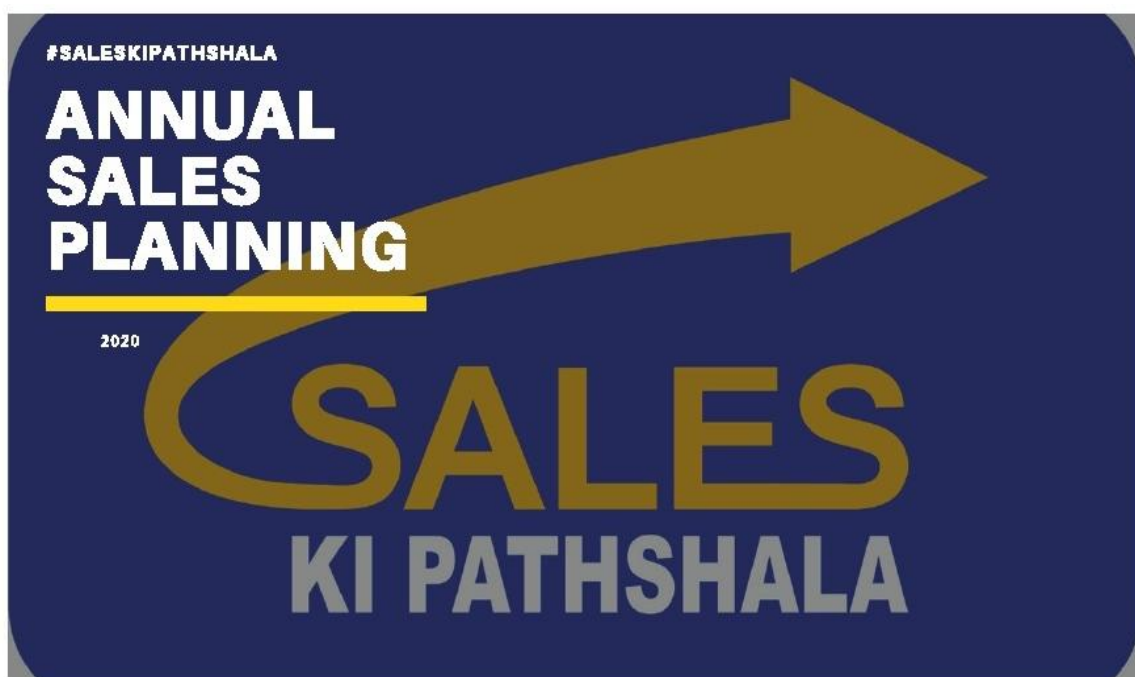
25th December 2019

Sales ki Patshala

Review of the year that was, 2019

(Summary of Sales in Rupees)

S.No.	Month	Category / SKU	Primary Sale (Rs)	Cross Sell (Rs)	Reference Sale (Rs)	Total sales (Rs)
1	January					
2	February					
3	March					
4	April					
5	May					
6	June					
7	July					
8	August					
9	September					
10	October					
11	November					
12	December					
	Total					

SKU –Stock Keeping Unit

(Summary of sales in numbers)

S.No.	Month	Category / SKU	Primary Sale (Number)	Cross Sell (Number)	Reference Sale (Number)	Total sales (Number)
1	January					
2	February					
3	March					
4	April					
5	May					
6	June					
7	July					
8	August					
9	September					
10	October					
11	November					
12	December					
	Total					

SKU –Stock Keeping Unit

What should we forecast?

SALES
New: Primary Sales, Reference Sales, Cross Sales
Old: ABV, ABS, Stickiness, Lapsation, RFM

CASH FLOW & PROFITABILITY
Realised Sales, Net Contribution

FANS, AMBASSADORS & EVANGELISTS
Life Time Value (LTV)

(Summary of CRM metrics for 2019)

S.No.	Month	ABV Average Basket Value	ABS – Average Basket Size	Recency	Frequency	Lapsation
1	January					
2	February					
3	March					
4	April					
5	May					
6	June					
7	July					
8	August					
9	September					
10	October					
11	November					
12	December					
	Total					

(Summary of Stickiness in Percentage)

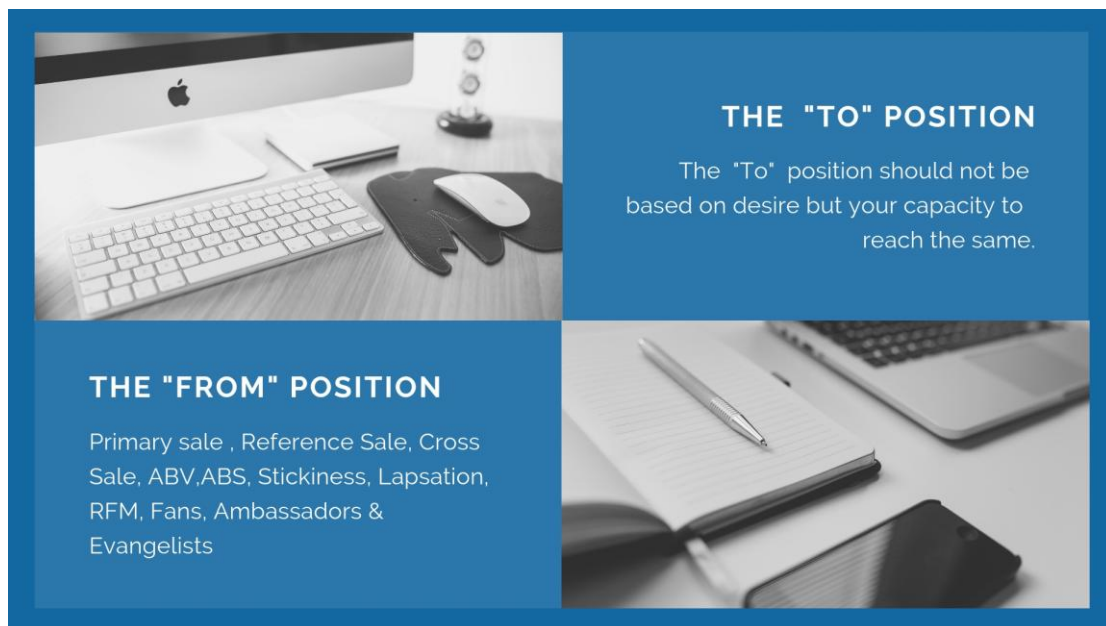| S.No.	Month	%age sticky to Category A	%age sticky to Category B	%age sticky to Category C	%age sticky to Category D	Total %age
1	January					
2	February					
3	March					
4	April					
5	May					
6	June					
7	July					
8	August					
9	September					
10	October					
11	November					
12	December					
	Total					

Capacity Assessment

WHICH CAPACITY?

To be able to fulfil your sales forecasts your capacity to outreach, demonstrate, decision making and install is important.
Min no of Touchpoints /day
Min no of Sales calls / day
Min no of Negotiations / day
Min no of Installations / day
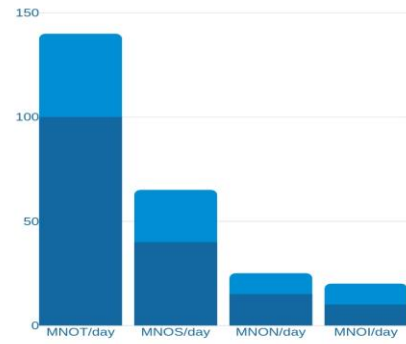
(Summary of Capacity displayed in 2019)

S.No.	Month	Database	Total Touch points	Total Sales Calls	Total Negotiations	Total Order Installations
1	January					
2	February					
3	March					
4	April					
5	May					
6	June					
7	July					
8	August					
9	September					
10	October					
11	November					
12	December					
	Total					

The "From – To" Sales Map for 2020

S.No.	Attribute	**From** (The year that was)	**To** (Desired Plan)	Extra Resources Required	Extra Budgets Required (Rs)
1	Average Basket Value (ABV)				
2	Average Basket Size (ABS)				
3	Stickiness %age for ABS < 2				
4	Lapsation %age for Recency< 1 year				
5	Frequency For Recency = 1 year				
6	Avg. New Customer Acquisition per month				

Action points : _____
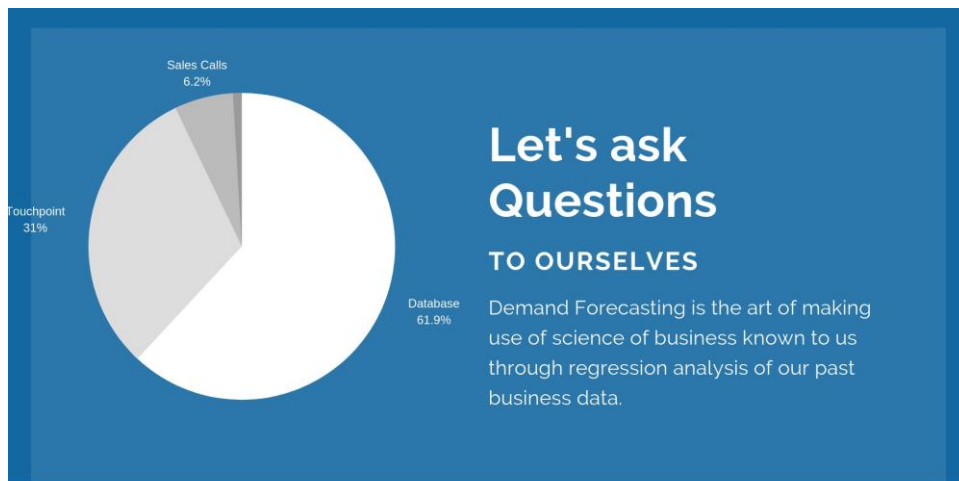
Q&A for Self as Strategic inputs towards sales planning and demand forecasting.

S.No.	Month	Database?	Total Touch points?	Total Sales Calls?	Total Negotiations?	Total Order Installations?
1	January					
2	February					
3	March					
4	April					
5	May					
6	June					
7	July					
8	August					
9	September					
10	October					
11	November					
12	December					
	Total					

The Cross Selling Forecast for 2020

Month	Primary Sale	Cross Selling 1	Cross Selling 2	Cross Selling 3	Total Cross Selling
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					
Total					

Note: Cross Selling should add incremental sale of 8% to Primary sale

The Reference Selling Forecast

(Vintage = 6 months, Customer Satisfaction Index = 1)

Month 2019	Month 2020	No of customers with CSI=1	Reference 1	Reference 2	Reference 3	ABV	Total sales in value (Rs)
Jan	Jan						
Feb	Feb						
Mar	Mar						
Apr	Apr						
May	May						
June	June						
July	July						
Aug	Aug						
Sep	Sep						
Oct	Oct						
Nov	Nov						
Dec	Dec						
Total							

Note: Reference Selling should add incremental sale of 15% to Primary sale

Demand Forecasting Timeline

QUARTER 1
75% energy in Preparation and 25% energy in Target achievement:
Focus on database building up . Sales Training, Goalsetting,
Strategy & Planning

QUARTER 2
75% energy in Target achievement, 25% energy in Outreach to new
touchpoint
2nd best sales quarter of the year

QUARTER 3
100% energy in Sales Target Achievment
Best sales quarter of the year.

QUARTER 4
100% energy in consolidation of annual forecasts.

Quarter	Month	Database	Touch points	Sales calls	Negotiations	Installations	Fans
1	Jan						
	Feb						
	Mar						
2	Apr						
	May						
	June						
3	July						
	Aug						
	Sep						
4	Oct						
	Nov						
	Dec						
	Total						

Quarter	Month	Primary Sale	Cross Sell	Reference Sell	Total Sale (Rs)
1, 2020	Jan				
	Feb				
	Mar				
2 , 2020	Apr				
	May				
	June				
3 , 2020	July				
	Aug				
	Sep				
4 , 2020	Oct				
	Nov				
	Dec				