

Sales Strategy Goals

What are the revenues associated from your sales plan?
What revenues will be generated from new, invested funds?
When will cash flow be generated from new revenues?
What is the structure of your sales team? How many sales people? Where are they? What do they sell?
What are the sales goals for your sales team?
What is the structure of your sales management team?
What are your sales quotas by product line, sales person, region or whatever metric is appropriate?
What latitude do your sales channels have to adjust prices?
Do your sales people and sales channels compete with each other for sales? Is this a problem?
What is your return policy?
What is your commission structure
What sales promotions will you use? When?
What will sales promotions cost you in dollars and lost revenue?
What Up-selling, cross-selling, opportunities do you have?

Sales Projections Goals

What do your sales look like over time?
What are your different revenue streams?
Which revenue streams contribute most significantly to total sales?
What are your important assumptions or important links to your sales/marketing plan you want to highlight?
What milestones or benchmarks do you anticipate as your sales grow over time?

Executive Summary

Provide a general overview of your company.
Introduce your products/services.
What is your mission and vision statement?
Describe your business model. (What does your business do to make money?)
What Strategic milestones, keys to success, or critical risks exist?
What Intellectual Property (IP) do you have, if any?
How much money do you need?
What are you going to do with the money?
When do you need it & for how long?
How will you pay me back?
How can you assure me that I will get my money back?
How do you market to, and acquire customers? How long do you need it for?
How will the funding be repaid?
What's special about your company?
What type of financial return will be generated from the acquired funds?
What are your margins?
What type of margins will the invested fund return?
How do your margins compare to others in your industry?
What resources do you need to be successful?
What are the strengths and weakness of your company?
What are the opportunities and threats for your company?