Your 90-Day Plan Template

This template is designed to give you the framework within which to build out your 90-Day plan. This information below is not a recommendation on the sequencing of your objectives or even the right objectives for your own B2B tech business.

For advice and best practice on how to do this effectively, visit our Sales for Startups Guide: 90-Day Plan Template.

First, you want to begin by ensuring you've captured the:

Overall Business Goal
Objectives Created
Project Timeline

90-Day Plan Stage	Example(s) where appropriate
Overall Business Goal	Increase monthly recurring revenue from £10k to £80k by December 31st, 2021.
Objectives Created	Obj. 1: Roll out 2021 sales commission plan
	Obj. 2: Kick-off product launch lead generation campaign
	Obj. 3: Hire a sales development representative with an offer accepted by X
	Obj. 4: Create a clear value proposition
	Obj. 5: Create a clear SaaS pricing model
	Obj. 6: Create a process for managing sales to global accounts
	Obj. 7: Create the full end-to-end sales process (lead identified to closed won/lost)
	Obj. 8: Create lead to opportunity qualification criteria
	Obj. 9: Create sales to customer success handover process and agree responsibilities
	Obj. 10: Create a sales team structure
	Obj. 11: Define funnel roles and responsibility from awareness to handover to sales
	Obj. 12: Create sales dashboards and reports for accurate forecasting and oversight

Project Timeline	w/c 05.07.21 **Sprint 1** - Obj. 1 & 2
	w/c 19.07.21 **Sprint 2** - Obj. 3 & 4
	w/c 02.08.21 **Sprint 3** - Obj. 5 & 6
	w/c 16.08.21 **Sprint 4** - Obj. 7 & 8
	w/c 30.08.21 **Sprint 5** - Obj. 7 & 8
	w/c 13.09.21 **Sprint 6** - Obj. 9 & 10
	w/c 27.09.21 **Sprint 7** - Obj. 11 & 12

Now we can start to drill down into the detail of each objective. We've chosen our first example as to how this could look:

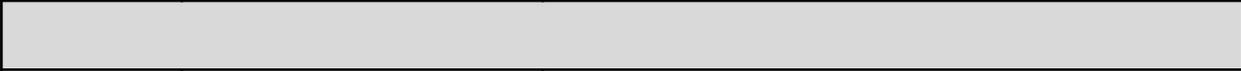| Objective 1	Start Date	5th July 2021
	Completion Date	16th July 2021
	Team Resources Involved	James, Alice, Alex, Patrick
	Team Resources to Approve	Alice, Patrick, Fleur
	Teams Impacted	Global Sales Team
	Completion Criteria	The objective is completed once we receive e-signatures from each rep on the new commission plan.
	Risks	Inability to reach an agreement between Finance and Sales.
Objective 1	Activity 1	Review proposed commission plan with Alex and Patrick.
	Activity 2	Propose changes in line with industry standards and present to Alice, Alex, Patrick and Fleur.
	Activity 3	Support Alex and Patrick in the running of scenarios to validate proposed changes.
	Activity 4	Review, together with Alex, Patrick and Fleur, the new plan.

	Activity 5	Support Patrick in the rollout and communication of the new commission plan to the global teams.
	Activity 6	Create new commission plan letters for each sales rep.
	Activity 7	Book individual meetings with Patrick for each sales rep for questions and any clarifications on the commission plan.
	Activity 8	Send to each rep for e-signature, once received file in the shared "People & HR" folder.

Want to try this for yourself? Fill in the blank template below:

90-Day Plan Stage	Your Business
Overall Business Goal	
Objectives Created	Obj. 1:
	Obj. 2:
	Obj. 3:
	Obj. 4:
	Obj. 5:
	Obj. 6:
	Obj. 7:
	Obj. 8:
	Obj. 9:
	Obj. 10:
	Obj. 11:
	Obj. 12:
Project Timeline	w/c [tbc] **Sprint 1** - Obj. 1 & 2

	w/c [tbc] **Sprint 2** - Obj. 3 & 4	
	w/c [tbc] **Sprint 3** - Obj. 5 & 6	
	w/c [tbc] **Sprint 4** - Obj. 7 & 8	
	w/c [tbc] **Sprint 5** - Obj. 7 & 8	
	w/c [tbc] **Sprint 6** - Obj. 9 & 10	
	w/c [tbc] **Sprint 7** - Obj. 11 & 12	

Objective 1	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 1	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 2	Start Date	

	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 2	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 3	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 3	Activity 1	

	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 4	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 4	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 5	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	

	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 5	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 6	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 6	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	

	Activity 5	

Objective 7	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 7	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 8	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	

	Completion Criteria	
	Risks	
Objective 8	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 9	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 9	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

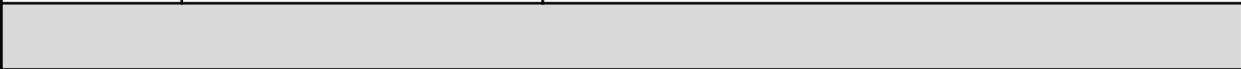| Objective 10	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	

Objective 10	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 11	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	

Objective 11	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	

Objective 12	Start Date	
	Completion Date	
	Objective Owner	
	Team Resources Involved	
	Team Resources to Approve	
	Teams Impacted	
	Completion Criteria	
	Risks	
Objective 12	Activity 1	
	Activity 2	
	Activity 3	
	Activity 4	
	Activity 5	