Lockview

2027 One-Page Sales Plan

Fill it in, print it, pin it up. Review it every month.

Business: **Plan owner:** **Date:**

1 Revenue target

Total for 2027. How much from existing customers, how much from new?

2 Ideal customer

Sector, size, location, the problem you solve, who signs off.

3 Top 10 target accounts

The ten businesses you most want to win this year.

4 What we sell

Key offers, average deal value, what makes you the obvious choice.

5 The numbers

Deals needed, win rate, proposals and meetings needed each month.

Revenue target (£)	
Average deal value (£)	
Deals needed	
Win rate (%)	
Proposals needed / month	
Meetings needed / month	

6 How we'll reach them

Referrals, LinkedIn, events, partners, email. Pick your top three.

7 Who does what

Names against each activity. Weekly activity targets.

8 Quarterly milestones

Q1, Q2, Q3, Q4: what must be true by the end of each quarter?

Q1

Q2

Q3

Q4

9 Risks and what we'll stop

What could knock you off course? What will you stop doing?

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How to fill in your plan

Give it one focused hour. Done is better than perfect.

1. Revenue target

Start with last year's actuals. Split the target between existing customers (renewals, upsell, cross-sell) and new business. Most growth plans lean too hard on new customers.

2. Ideal customer

Look at your 10 best customers. What do they have in common? Write it down so everyone in the team chases the same kind of business.

3. Top 10 target accounts

Name real businesses, not sectors. If you won just three of them, what would that do to your year?

4. What we sell

List your core offers and the average deal value for each. If you can't say why you win in one sentence, work on that first.

5. The numbers

Work backwards from the target. Example: £500k target at £10k a deal is 50 deals. At a 25% win rate that's 200 proposals, about 17 a month. If half your meetings lead to a proposal, you need around 33 meetings a month.

6. How we'll reach them

Pick the three channels that have actually worked for you. Put a weekly activity number against each one.

7. Who does what

Every activity needs a name. Weekly targets beat annual ones because you can fix a bad week.

8. Quarterly milestones

Break the year into four 90-day sprints. Review progress at the end of each quarter and adjust.

9. Risks and what we'll stop

Name the risks: one big customer leaving, a key person, capacity. Then decide what you'll stop doing to make room for what matters.

Your 30-minute monthly review

1. Are we on track against the revenue target?
2. Are we hitting the activity numbers in box 5?
3. Which target accounts have moved forward?
4. What is the one thing we'll fix this month?

Want a second pair of eyes on your plan?

Book a free 30-minute call with Adrian McCourt. We'll pressure-test your numbers, spot the gaps and agree the three things that will make the biggest difference in 2027.

Book your free call