

Sales & Marketing Planning for Startups

Turning Your Marketing Plan into Revenue

A practical 3-hour planning workbook for startup founders

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Workshop promise

By the end of this workshop, you will have:

A 90-day revenue target, sales target, lead target, clear offer statement, ideal customer snapshot, 3 lead sources, weekly marketing rhythm, and a practical 30/60/90-day action plan.

Participant name: _____

How to Use This Workbook

This workbook is designed to be completed during the workshop. Use rough but realistic numbers. The aim is not perfection; the aim is to build a practical plan you can start using immediately.

Important principle

Marketing activity should be chosen after you know the revenue, sales and lead numbers your business needs. Do not start with tactics. Start with the target.

Workshop flow

Step	What you will create
1. Revenue target	What you want the next 90 days to generate.
2. Sales target	How many sales or customers are required.
3. Offer and customer clarity	What you are selling and who it is for.
4. Lead target	How many qualified leads you need.
5. Marketing activity	The 3 lead sources you will focus on.
6. 90-day plan	Your 30/60/90-day implementation plan.

Tip: Use pencil or editable text if you are unsure. You can refine the numbers after the workshop.

Opening Reflection

Before we build the plan, capture where your marketing is today. This will help you identify what needs to change.

What marketing activity are you currently doing?	
Is it generating leads? What evidence do you have?	
Do you know how many sales you need in the next 90 days?	
What feels most unclear about your marketing right now?	

Key idea

Random marketing creates random results. Today you will replace guesswork with a simple revenue-first planning system.

Part 1: Set Your 90-Day Revenue Target

A revenue target gives your marketing a job to do. For this workshop, we will use a 90-day target because it is long enough to create progress but short enough to stay focused.

Good targets are specific

Weak target	Stronger target
I want more customers.	I want to generate £6,000 in 90 days.
I want to grow.	I want to sell 10 packages in 90 days.
I want more visibility.	I want to generate £3,000 per month within 3 months.

Exercise 1: Choose your 90-day revenue target

What revenue would I like to generate in the next 90 days?	£
Why does this number matter to my business?	
Is this realistic based on my current capacity?	Yes / No / Not sure
What would need to be true for me to achieve this?	

Part 2: Calculate the Sales Required

Your revenue target tells you where you want to go. Your sales target tells you how many customers, orders, packages or projects are needed to get there.

Formula

Sales required = 90-day revenue target divided by average sale value

Average sale value

Average sale value is the typical amount a customer pays you per sale, order, project or package. Use a realistic average if you sell more than one thing.

Example	Typical sale value
Consultant package	£1,500
Fitness programme	£300
Website project	£2,000
Product order	£45
Beauty treatment	£60

Exercise 2: Calculate your sales target

90-day revenue target	Average sale value	Sales required
£	£	

Example: £12,000 revenue target divided by £1,000 average sale value = 12 sales required.

Part 3: Define Your Offer

Before you generate leads, get clear on what you are selling. Confused offers create confused marketing.

Simple offer statement

I help [type of customer] achieve [result] through [product/service] without [main problem or frustration].

Exercise 3: Build your offer statement

I help...	
Achieve...	
Through...	
Without...	
My simple offer statement:	

Offer clarity check

Is the customer clear?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Needs work
Is the result clear?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Needs work
Is the offer easy to understand?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Needs work
Is the problem or frustration clear?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Needs work
Would someone know what to do next?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Needs work

Part 3 Continued: Define Your Ideal Customer

Your marketing should not speak to everyone. A useful plan is built around the people most likely to value, need and buy your offer.

Exercise 4: Ideal customer snapshot

Who is my ideal customer?	
What problem do they have?	
What result do they want?	
What might stop them buying?	
Where can I realistically reach them?	

Good lead reminder

A good lead is not just anyone who shows interest. A good lead has the problem you solve, can afford or justify your offer, and is likely to take action.

Part 4: Calculate the Leads Needed

Sales come from leads, conversations and enquiries. This section turns your sales target into a lead generation target.

Formula

Leads needed = Sales required divided by close rate

Close rate guide

Situation	Suggested close rate
New offer or untested audience	10-15%
Some warm leads or referrals	20-30%
Strong offer and good sales process	30-50%

Exercise 5: Calculate your lead target

Sales target	Close rate	Leads in 90 days	Leads per month	Leads per week
	%			

Example: 12 sales needed divided by 25% close rate = 48 leads needed in 90 days.

Part 5: Choose Your Marketing Activity

Now you know what marketing needs to produce. Choose the few activities most likely to generate the leads your business needs.

Lead source menu

Lead source	Best for	Example activity
Referrals	Trust-based services	Ask warm contacts for introductions
Networking	Local and B2B businesses	Attend events and follow up
LinkedIn outreach	B2B services	Connect with ideal prospects
Google Business Profile	Local businesses	Post updates and collect reviews
Email follow-up	Existing contacts	Send useful emails and offers
Content marketing	Authority building	Publish useful posts or articles
Partnerships	Reaching existing audiences	Build referral or audience partnerships
Paid ads	Tested offers with tracking	Run small-budget campaigns

Part 5 Continued: Select Your Top 3 Lead Sources

Do not choose everything. Choose three lead sources that are relevant to your customer, realistic for your time and budget, and measurable.

Exercise 6: Pick your top 3 lead sources

Lead source	Why this channel?	90-day lead target
1.		
2.		
3.		

Exercise 7: Turn lead sources into weekly action

Lead source	Weekly action	When will I do it?
1.		
2.		
3.		

Be specific. "Post more" is vague. "Publish two helpful customer-problem posts every Tuesday and Thursday" is stronger.

Part 6: Build Your 90-Day Plan

Your 90-day plan turns the numbers into action. Keep it simple: foundations first, lead generation second, improvement third.

30/60/90-day structure

Days 1-30: Fix foundations	Days 31-60: Generate leads	Days 61-90: Improve and repeat
Clarify offer Confirm customer Update website/landing page Set up tracking Prepare follow-up process	Start weekly marketing rhythm Attend events Ask for referrals Publish useful content Follow up with warm contacts	Review what generated leads Improve follow-up Collect testimonials/reviews Repeat what worked Set next target

Exercise 8: Complete your 90-day action plan

Days 1-30	Days 31-60	Days 61-90

Weekly KPI Tracker

Track simple numbers every week. You do not need a complex dashboard. You need enough information to know whether your marketing is creating movement.

Week	Activity completed	Conversations	Leads	Calls/quotes	Sales won	Revenue	Best activity
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

Review this every week. If an activity is not creating conversations or leads, adjust it or replace it.

Your 90-Day Sales & Marketing Plan Snapshot

Use this page as your one-page summary after the workshop.

Planning item	My answer
90-day revenue target	
Average sale value	
Sales required	
Simple offer statement	
Ideal customer	
Estimated close rate	
Leads required	
Top 3 lead sources	
Weekly marketing rhythm	
First action this week	

Your First 7 Days

Do not leave with 20 actions. Choose a few actions that will create momentum in the first week.

Choose your first 3 actions

Action	When will I do it?	Done?
1.		[]
2.		[]
3.		[]

Final commitment

In the next 7 days, I will:	
The person I will ask to hold me accountable is:	
The date I will review my progress is:	

Closing thought

Marketing becomes easier when it has a job to do. Choose the right few actions, do them consistently, measure what happens, and improve every month.