

Strategies for Driving Predictable Revenue and High-Performing Teams

Company Name: _____

Plan Owner: _____

Fiscal Year: _____

1. Executive Alignment & Goals

Defining the financial baseline and operational capacity for the fiscal year.

Financial Targets (Annual Operating Plan)

- Total Revenue Goal: \$ _____
- New Logo Revenue: \$ _____
- Expansion/Renewal Revenue: \$ _____
- Cost of Sales Budget: \$ _____

Capacity Planning

- Total Quota Carrying Headcount: _____
- Average Quota per Rep: \$ _____
- Ramp Time for New Hires: _____ Months
- Attrition Buffer (Turnover Estimate): _____ %

2. Market Segmentation Strategy

Defining target segments based on sophisticated firmographics and intent data.

Segment Name	Definition (Firmographics)	Data Signals & Intent	Priority & Motion
Strategic (Tier 1)	Revenue >\$1B, Employee >5k	Intent Data, Tech Spend, Executive Changes	High Touch (Account-Based)
Enterprise (Tier 2)	Revenue \$200M-\$1B	Growth Signals, Hiring Trends, Funding News	Hybrid Motion
Growth (Tier 3)	Revenue <\$200M	Inbound Interest, Website Visits, Content Downloads	Digital-Led / Transactional

3. Territory & Quota Design

Ensuring equitable distribution of opportunity across the sales organization.

Territory Logic

- **Primary Methodology:**

- _____ Geographic
- _____ Vertical / Industry
- _____ Named Accounts (ABS)

- **Balancing Metrics:**

- Metric 1 (e.g., TAM): _____
- Metric 2 (e.g., Propensity to Buy): _____

Quota Logic

- **Quota Setting Methodology:**

- _____ Top-down (Derived from Finance Goals)
- _____ Bottom-up (Derived from Historical Capacity)

- **Equity Check:** Ensure top 10% of territories do not hold >50% of total pipeline potential.

4. Sales Methodology & Execution

The specific strategies used to engage buyers and close business.

Strategy A: Account-Based Selling (ABS)

- **Focus:** Tier 1 Strategic Accounts.

- **Orchestration Plan:**

- Marketing Deliverables: _____
- Required Stakeholders (Multi-threading): _____
- Executive Sponsorship Level: _____

Strategy B: Value-Based Selling

- **Core Differentiation:** Business Impact vs. Feature Set.

- **Key Deliverables:**

- Business Case / ROI Model: Required for all deals: \$ _____
- Mutual Action Plan (MAP): Required for all deals in the Negotiation stage.

5. Incentive Compensation Alignment

Aligning behavior with business objectives through compensation structures.

- **Primary Behavioral Driver:** (e.g., Multi-year contracts, Product mix, Cash collection)
 - Objective: _____
 - Incentive Lever: _____
- **Transparency Tools:**
 - _____ Real-time Dashboard (ICM)
 - _____ Periodic Statements
- **Clawback Policy:** _____

6. Forecasting & Revenue Intelligence

Utilizing data signals to drive forecast accuracy.

Forecasting Standards

- **Commit Criteria:**
 - _____ Budget Confirmed
 - _____ Legal/Procurement Engaged
 - _____ Mutual Action Plan Signed
- **Leading Indicators (Health Signals):**
 - Engagement Score: _____
 - Stakeholder Count: _____
 - Deal Velocity: _____

7. Post-Sale Retention & Expansion

Strategies to secure recurring revenue and drive net-dollar retention.

- **Sales-to-CS Handoff Trigger:** _____
- **Churn Risk Indicators:** _____
- **Expansion Strategy:**
 - Cross-Sell Targets: _____
 - Upsell Incentives: _____

8. Measurement & Effectiveness

Key Performance Indicators (KPIs) to track plan health.

Metric	Target	Rationale
Attainment Distribution	>60% of reps at Quota	Ensures quotas are realistic and fair.
Forecast Accuracy	+/- 5% Variance	Builds predictability for the business.
Pipeline Coverage	3x - 5x Coverage	Mitigates risk of deal slippage.
Renewal Rate	>90%	Validates long-term customer value.

Quarterly Review Schedule

Dates to review and adjust the plan based on market feedback.

- Q1 Review: _____
- Q2 Review: _____
- Q3 Review: _____
- Q4 Review: _____

About Xactly

Xactly provides the only AI-powered platform that combines revenue intelligence and sales performance management so organizations can unlock their full revenue potential. Backed by two decades of pay and performance data, Xactly’s Intelligent Revenue Platform is designed for finance, revenue, compensation, and sales leaders who want to drive quality, sustainable revenue. To learn more about Xactly and the latest issues and trends in revenue intelligence, visit us at XactlyCorp.com, follow our [blog](#), and connect with us on [LinkedIn](#).

