

Sales Manager's Toolkit Menu

The Sales Manager Toolkit includes 17 tools to plan and manage your sales operations and account management programs. The toolkit includes HTML and Flash tools as well as Word, Excel, and project management templates created with Gantt Project an open source project management software package that is available for Java, Windows, iOS and Linux platforms. The GANTT chart templates can be opened with Microsoft Project or you will need a version of Gantt Project freeware which you can download at www.ganttproject.biz.

Instructions: Click the hyperlinks next to the tool description to launch a tool. If you select the HTML version, it will open in your default browser. Selecting the Excel, Word or Gantt Projects versions will open it in that application or give you a choice to open the file with one of those applications.

Quick Links Menu to Sections

[Marketing Planning & Analysis](#)

[Sales Planning & Management Tools](#)

[Event & Trade Show Marketing Tools](#)

Table of Tools

Name	Description	Versions	
Sales Planning & Management Tools		Back to Top	
Sales Capabilities Assessment Tool	Use this tool to help you determine if your organization's sales capabilities are in line and appropriate for helping your organization compete and achieve your overall business financial goals.	HTML	Excel
Sales Force Sizing Tool	Use the "Sales Force Sizing Tool" to help you determine the optimum size of your sales team based on the number and types of customers/prospects that you have, the frequency of calls that must be made to them, and the percentage of time that salespeople can devote to actually making calls on customers/prospects.	HTML	Excel
Sales Lead Flow Calculator (Based on Revenue Objective)	Use this tool to calculate the total leads needed in your pipeline to hit a given revenue target for a specific period. This Sales Leads Pipeline Calculator tool calculates the sales leads needed in the pipeline to achieve a given revenue target for a specific period based on the values entered into the input boxes on this tool. The computations are tied to a specified period and not a specific marketing program or campaign.	HTML	Excel (Basic) Excel (Advanced)
Sales Opportunity Assessment Tool	Use this "Sales Opportunity Assessment Tool" to evaluate each sales opportunity to determine if it is a "Win-Win," "Winnable" or "Worth winning." Why use this tool? The underlying purpose is to help better allocate your resources to sales opportunities that fall into the aforementioned quadrants, rather than spending time, money and other resources on opportunities that will not convert or take too long to convert to a sale.	HTML	Excel
Sales Prospecting Activity Rate Calculator	Use this Sales Prospecting Activity Rate Calculator to compute the number of calls to prospects that sales representatives need to make a week in order for your company to achieve its annual sales goal.	HTML	Excel
Sales Territory Call Planning Tool	Use the "Sales Territory Call Planning and Scheduling Optimization Tool" to will help you conduct "what-if" analysis for optimizing your sales coverage for either a direct sales force that has face-to-face contact with customers / prospects or a tele-sales salesforce based in a call center. The tool will calculate the expected gain or loss in closes, revenues and profits based on the variables that you enter.	HTML	Excel
Strategic Account Planning Brief Template	Use this template to develop your long term sales (account) plans for each of your prospect or client (customer) account for your sales organization. This plan is a way of organizing and managing you client account plans so that you can optimize the services and products that are offered to them.	HTML	Word
Account Executive Sale Plan Template	Use this template to develop your account executive's sales account plans for each of your prospect or client (customer) accounts for each of your sales associates in your sales organization.	HTML	Word

Sales Leads Flow Planning Calculator (Based on Sales Cycle)	Use this Sales Lead Flow Calculator to calculate the number of leads that you need to have in the pipeline for each sales executive (rep) at the beginning of a sales cycle in order to achieve the desired gross revenue for the period based on the number of account executives and the average transaction value.	HTML	Excel
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Marketing Planning & Analysis Tools

CRM Vendor Evaluation Tool	Use this CRM application and vendor evaluation tool to compare potential CRM solutions and the vendors that provide them. For each parameter, rank vendors' applications and or the vendors based on their ability to deliver on your requirements.	HTML	Excel
CRM Assessment Tool	The CRM (Customer Relationship Management) Assessment will help you identify opportunities to optimize your current customer relationships and improve acquisition and retention performance	HTML	Excel

Event Trade Show Marketing Tools

[Back to Top](#)

Trade Show Event Attendance Calculator	Use the Event / Tradeshow Attendance Calculator to help you calculate the potential audience or buyers that will visit your organization at an event or conference. It will help you in planning your staffing, marketing collateral and incentives requirements for the event.	HTML	Excel
Trade Show Event Breakeven ROI Calculator	Use the Tradeshow ROI & Breakeven Calculator tool to calculate the breakeven and ROI for a trade show, event or conference, with or without the costs associated with having a booth at the event.	HTML	Excel
Event Marketing Brief Template	Use the event marketing brief template to help you prepare an event brief for a specific business show or event.	HTML	Word
Event Planning Checklist Template	Use this 14-page template will guide you through every activity necessary to execute an event, conference or trade show. Sections in the template include: starting checklist, accommodations, transportation, registration, speaker, meeting facilities, speakers, entertainment activities, and more.	HTML	Word
Marketing Seminar/Webinar Plan Project Template	Use this Gantt Chart template to layout your marketing seminar (webinar) plans. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can eliminate or add tasks and set up the appropriate timing and also the persons responsible for each task. You will need a version of Gantt Project freeware which you can download at www.ganttproject.biz or Microsoft project to open this template. Note: To launch this template, you must have Gantt Project or Microsoft Project installed. Then open the toolkit folder and double click the file to open it.	Gantt Project	
Marketing Event Planning Project Template - GANTT Chart	Use this Gantt Chart templat to layout your event marketing plans. By default, the chart is already filled out with tasks that typically need to be performed for such a launch. You can eliminate or add tasks and set up the appropriate timing and also the persons responsible for each task. You will need a version of Gantt Project freeware which you can download at www.ganttproject.biz or Microsoft project to open this template. Note: To launch this template, you must have Gantt Project or Microsoft Project installed. Then open the toolkit folder and double click the file to open it.	Gantt Project	

[Back to Top](#)