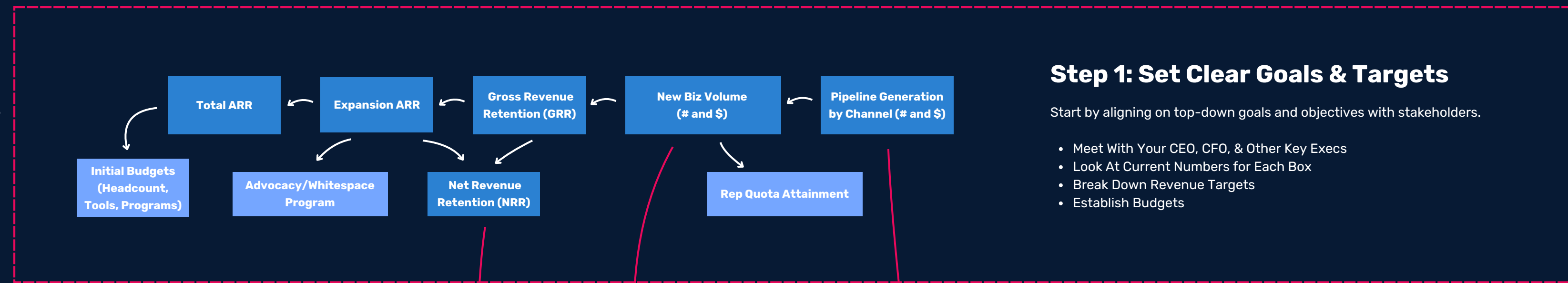


How to Create an Annual Plan

Set yourself up for success on day one of Q1.

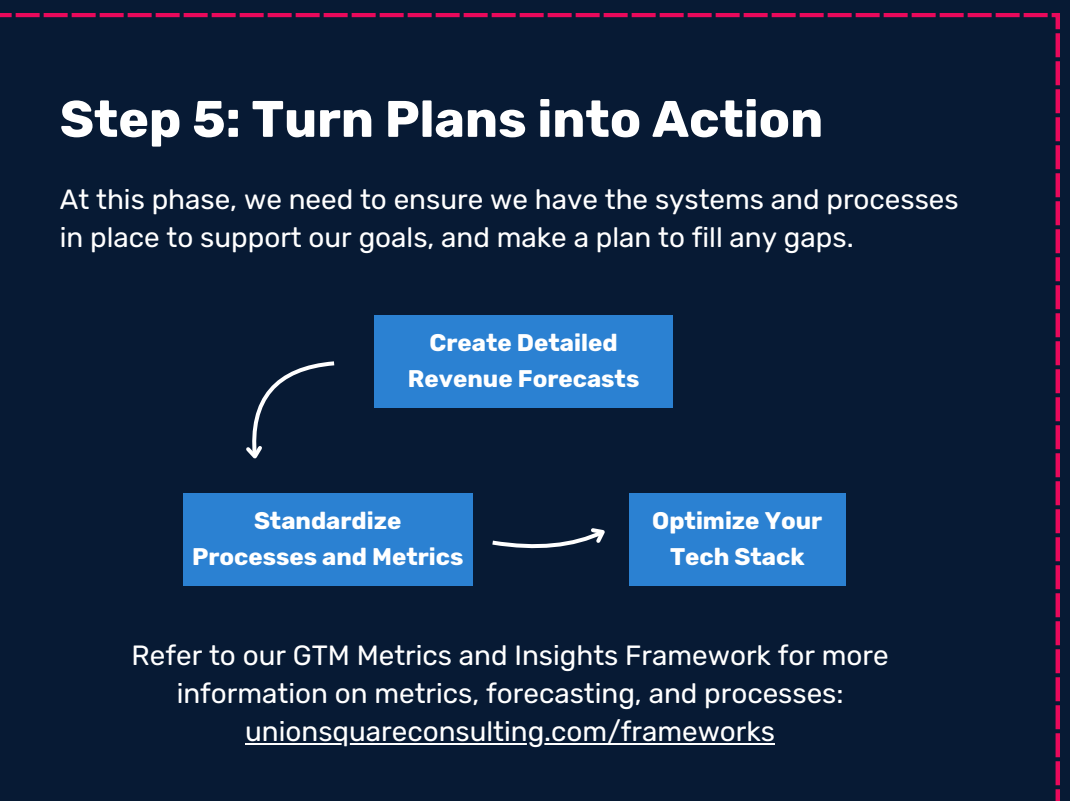
[Click here to see the full Framework](#)



Step 1: Set Clear Goals & Targets

Start by aligning on top-down goals and objectives with stakeholders.

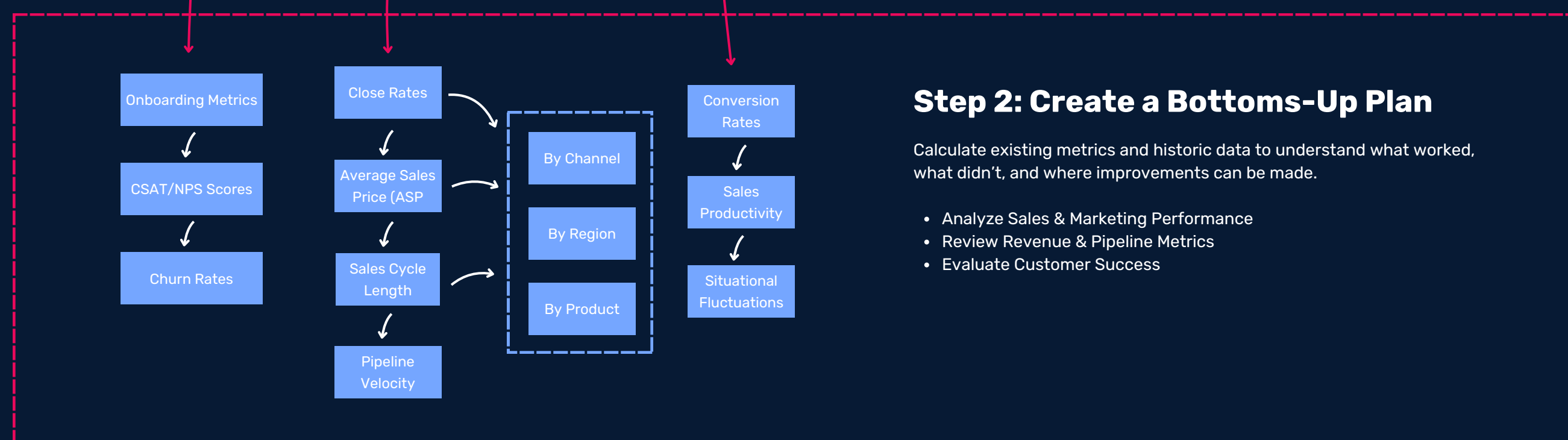
- Meet With Your CEO, CFO, & Other Key Execs
- Look At Current Numbers for Each Box
- Break Down Revenue Targets
- Establish Budgets



Step 5: Turn Plans into Action

At this phase, we need to ensure we have the systems and processes in place to support our goals, and make a plan to fill any gaps.

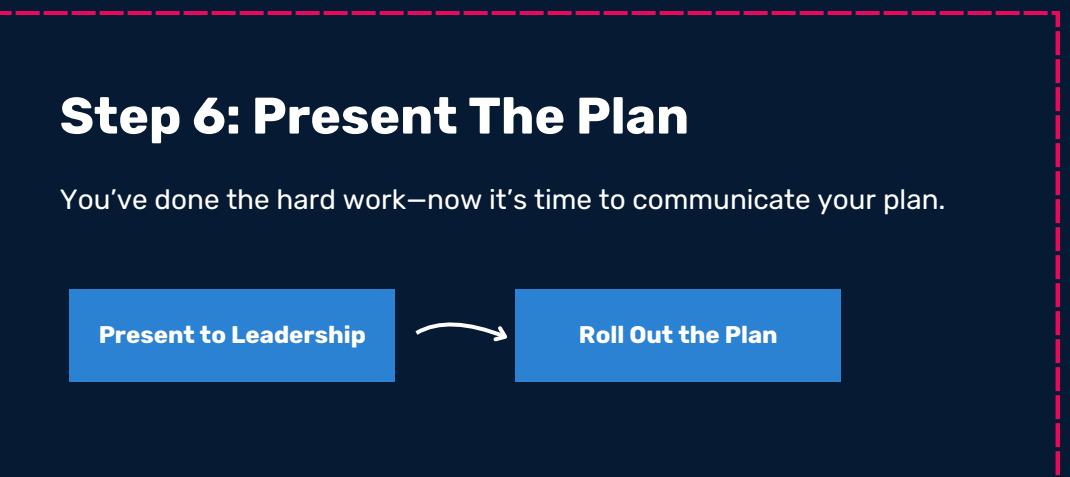
Refer to our GTM Metrics and Insights Framework for more information on metrics, forecasting, and processes: unionsquareconsulting.com/frameworks



Step 2: Create a Bottoms-Up Plan

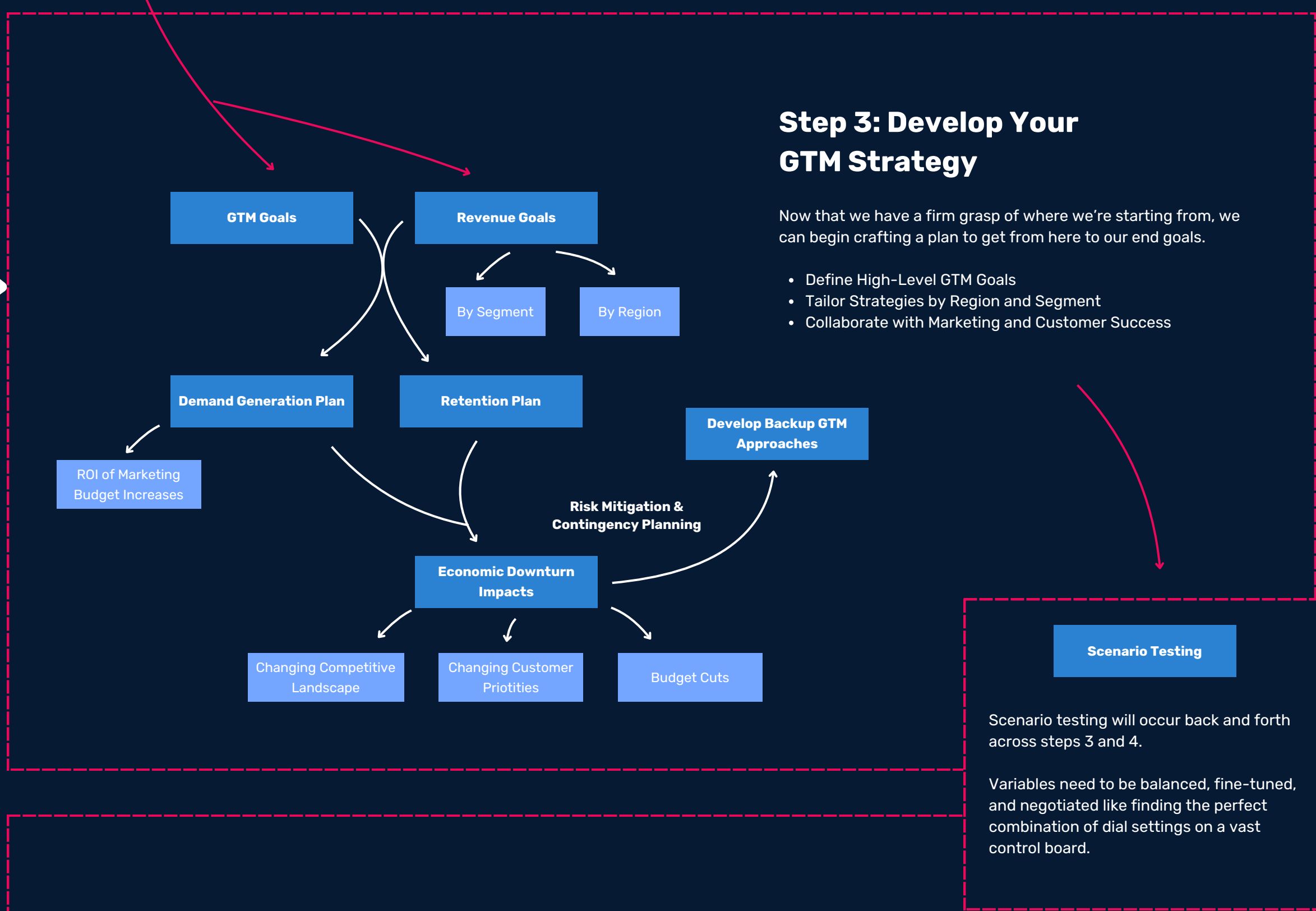
Calculate existing metrics and historic data to understand what worked, what didn't, and where improvements can be made.

- Analyze Sales & Marketing Performance
- Review Revenue & Pipeline Metrics
- Evaluate Customer Success



Step 6: Present The Plan

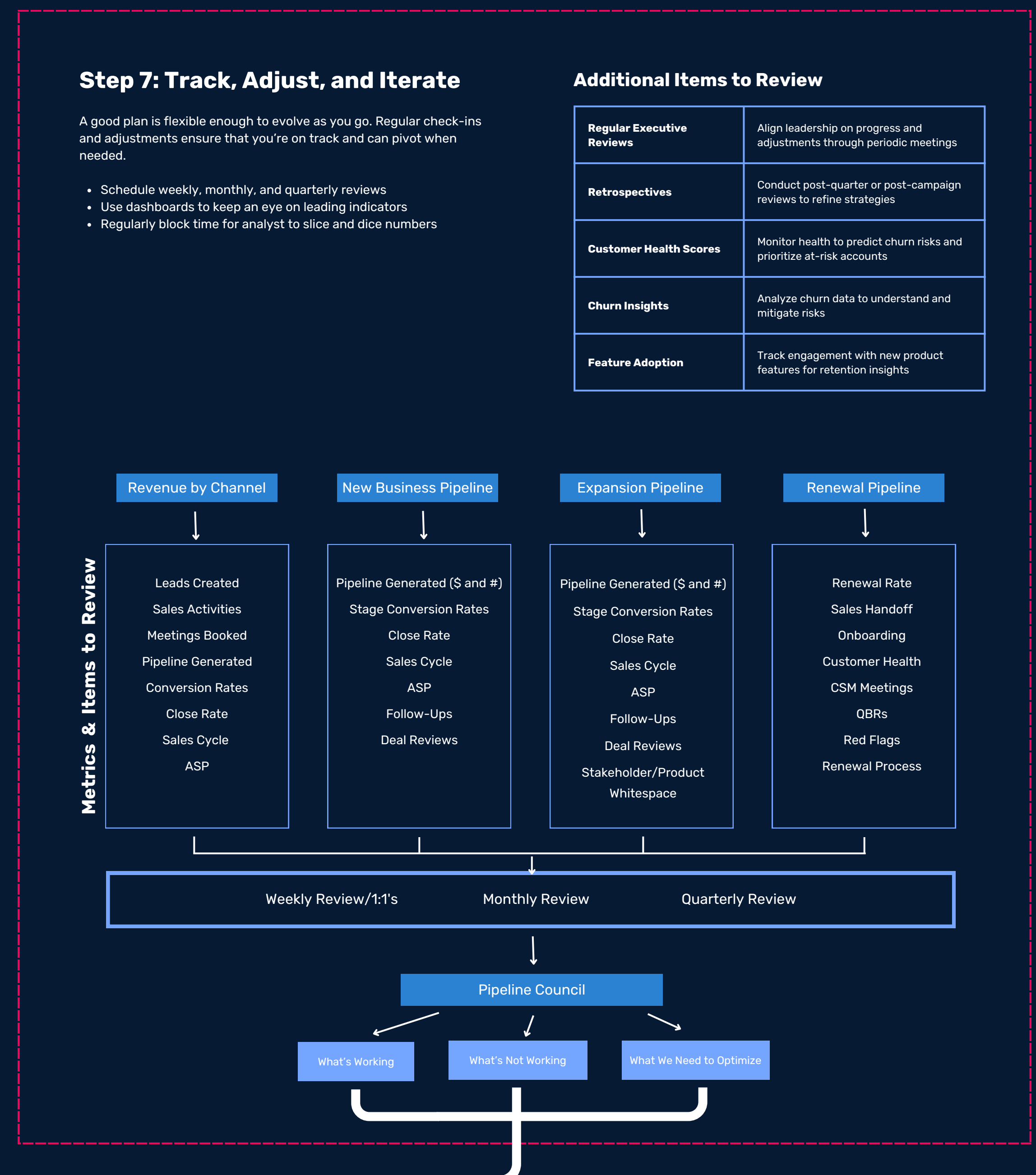
You've done the hard work—now it's time to communicate your plan.



Step 3: Develop Your GTM Strategy

Now that we have a firm grasp of where we're starting from, we can begin crafting a plan to get from here to our end goals.

- Define High-Level GTM Goals
- Tailor Strategies by Region and Segment
- Collaborate with Marketing and Customer Success



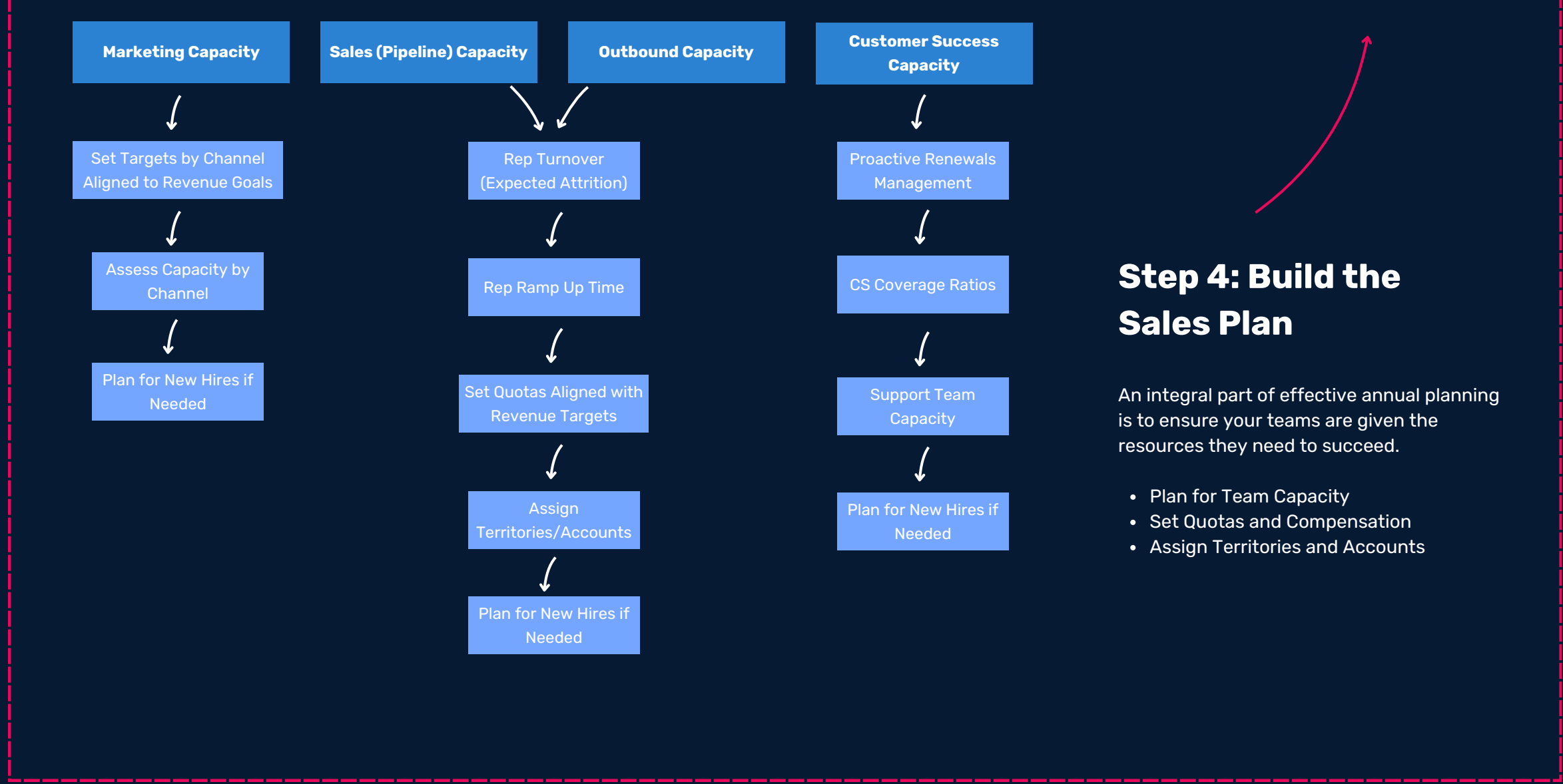
Step 7: Track, Adjust, and Iterate

A good plan is flexible enough to evolve as you go. Regular check-ins and adjustments ensure that you're on track and can pivot when needed.

- Schedule weekly, monthly, and quarterly reviews
- Use dashboards to keep an eye on leading indicators
- Regularly block time for analyst to slice and dice numbers

Additional Items to Review

Regular Executive Reviews	Align leadership on progress and adjustments through periodic meetings
Retrospectives	Conduct post-quarter or post-campaign reviews to refine strategies
Customer Health Scores	Monitor health to predict churn risks and prioritize at-risk accounts
Churn Insights	Analyze churn data to understand and mitigate risks
Feature Adoption	Track engagement with new product features for retention insights



Step 4: Build the Sales Plan

An integral part of effective annual planning is to ensure your teams are given the resources they need to succeed.

- Plan for Team Capacity
- Set Quotas and Compensation
- Assign Territories and Accounts

Get your own editable copy of the Annual Planning Checklist here:

<https://bit.ly/uscapchecklist>