A PRACTICAL PLANNING EXAMPLE

From commercial priorities to owned actions.

Illustrative scenario: a technology SME needs a more dependable pipeline and a structured decision on one new market.

Example assumptions

A small commercial team, incomplete opportunity records and limited capacity for market expansion. All actions, roles and measures below are illustrative.

01

Improve pipeline visibility

Within 30 days, review every active opportunity. Record an owner, stage, estimated value, expected decision date and next customer action. Flag missing or uncertain information rather than treating it as a confirmed forecast.

02

Focus sales effort

Agree a short target-customer profile and select a manageable priority-account list. Review evidence of customer need and qualification before committing proposal effort.

03

Test one market opportunity

Compare customer demand, route-to-market options, commercial partners and likely resource requirements. Use a decision gate before approving further spending.

The purpose is a clearer set of decisions and responsibilities. This sample does not claim client results or promise a particular commercial outcome.

EXAMPLE 30-DAY DELIVERY PLAN

Make ownership visible.

Relative dates below run from the start of an agreed engagement. Owners are example roles, not named individuals.

DAYS 1-7 | Commercial lead

Review active pipeline and agree stage definitions.

Baseline: completeness of required fields; opportunities without a next action.

DAYS 8-14 | Sales lead

Agree target-customer criteria and priority accounts.

Record the selection rationale, account owner and first customer action.

DAYS 15-21 | Market lead

Prepare a short evidence-based market assessment.

Document customer evidence, entry options, costs, risks and unresolved questions.

DAYS 22-30 | Owner / MD

Review progress and decide the next 30-day priorities.

Proceed, pause or stop each initiative. Assign an owner and date to each decision.

Weekly review: what changed, what is blocked, what decision is needed, and who will act by when?

Build a plan around your business

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