



TRIMAX "GOLDEN PIPELINE" BUDGET WORKSHEET

Print out this form to aid in budgeting for your sales and marketing programs. It will help you review past performance, set realistic expectations of leads that need to be generated to make the plan, and be a guideline to estimate investment in lead generation necessary to make the sales plan. You can utilize this form for each channel of sales lead generation and then combine them into your master budget planning grids.

1. Total Market Projected Annual Sales \$ _____
2. Share of Market X _____ %
(Current/Projected)
3. Sales Target \$ _____
(Line 1 x Line 2)
4. Percentage New Sales Needed to Meet Budget _____ %
5. New Customer Sales Needed \$ _____
6. Average New Customer Sales/Value \$ _____
7. New Customer Sales Needed to Meet Goal _____
(Line 5 divided by Line 6)
8. Closing Percentage on Current Sales Leads _____ %
(10% closing ratio, 15% closing ratio, etc.)
9. Number of Leads Needed to Meet Sales Goal _____
(i.e. your goal 100 sales/you close at 10%...you need 1,000 leads to meet goal)
10. Average Length of Sales Cycle _____
11. Inquiries Needed to Convert to Sale in Budget Year ____% _____
(i.e. if your closing ratio is 10% and your life cycle is 12 months you need to adjust your sales budget percentage to reflect booked sales expected in the budgeted year)
12. Number of Inquiries Adjusted to Meet Budget Year Sales Goal _____
13. Current and/or Projected Average Cost for Inquiry _____
14. Marketing Budget Needed to Meet Sales Goal _____
(Line 12 x Line 13)