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|  |  | John **Doe** | | | | | | | |  | **QUARTERLY** | | | |  |
|  |  |  | My Company Name | | |  |  | Sales Department | |  | WORK PLAN | | | |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
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|  |  | YEAR: | 2023 |  | QUARTER: | Q1 | |  |  |  |  |
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|  |  | **GOAL** | | | |  |  |  | **GOAL** |  |  |  | **GOAL** |  |  |
|  |  | Introduction to organization | | | |  |  |  | Financial plans |  |  |  | Identify road to success |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  | Priority u | |  |  |  |  |  | Priority u |  |  |  | Priority u |  |  |
|  |  | Get to know all the key people in the organization and understand the scope of work. | | | |  |  |  | Investigate how our business earns money. Which customers are vital for our business. |  |  |  | Deeply familiarize yourself with the culture of communication with key customers. |  |  |
|  |  | Priority v | |  |  |  |  |  | Priority v |  |  |  | Priority v |  |  |
|  |  | Organize 1:1 meetings with people who will supply you with information. | | | |  |  |  | Study the detailed financial plan for 2023. Work on key items immediately. |  |  |  | Identify key KPIs that can lead you to rewards within the company. |  |  |
|  |  | Priority w | |  |  |  |  |  | Priority w |  |  |  | Priority w |  |  |
|  |  | Find out which are the main profit centers and where the maximum profit is generated. | | | |  |  |  | Try to become familiar with the software used by the company for financial forecasts. |  |  |  | Study procedures related to coordination between the financial and technical teams. |  |  |
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