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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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