

Sales close plan template

A sales close plan template is an internal checklist for the last stretch of one deal: every remaining step between verbal intent and signature, each written as a verifiable event with an owner on both sides and a date, plus the approvals, risks and concessions the buyer never sees.

Last updated 2026-10-25. Online version: <https://www.revspire.io/resources/templates/sales-close-plan-template>

How to use this template

1. **Start it at verbal intent, not at contract-sent:** The day a buyer says yes in a meeting is the day the plan starts, because that is when the invisible work begins. Waiting until the contract goes out gives away two of the weeks you will later wish you had.
2. **Write every step as an event someone could verify:** If a row cannot be confirmed by a second person without asking you, rewrite it. "Chase procurement" is an activity; "supplier number issued" is a fact.
3. **Put a named owner on both sides:** A step owned by "the buyer" is owned by nobody. If you cannot name the person, that is not a formatting gap, it is a discovery gap, and it goes in the risk log until the name exists.
4. **Date the paper process backwards from signature:** Ask how long legal, security and procurement each take at this buyer, then work back from the signature date. If the arithmetic does not fit, the date moves now, in your forecast, rather than in the last week.
5. **Reconcile it with the mutual action plan weekly:** The buyer-facing plan and the internal one must agree on dates. When they diverge, one of them is wrong, and finding out which is the most useful conversation of the week.
6. **Let an unowned step move the forecast:** A step with no owner and no date by the weekly review is not a task, it is a slip you have not booked yet. Move the close date or get the name; doing neither is how a commit becomes a surprise.

The template

Five blocks, one deal. Fill the header once, then run the plan from the steps table: everything else exists to explain why a step is late or what it will cost to fix.

Deal header

Field	What to write	Your entry
Deal and value	Account, products in scope and the amount as currently quoted.	

Target signature date	The date the plan works backwards from. Change it only in writing, with the reason.	
Economic buyer	The person whose budget pays, and whether they have been in any meeting yet.	
Who signs	The named signatory and the route to them: who sends the contract, in what system.	
Champion	Who is selling internally when you are not in the room, and what they personally gain.	
Forecast category	What your forecast currently claims, so the plan and the number can be compared.	

Remaining steps to signature

Step, written as a verifiable event	Owner (name and side)	Due date	Status	Evidence it happened
Commercial terms approved on our side	[Name], seller	[Date]	Not started / in progress / done	Approval recorded against the quote
Security questionnaire submitted and accepted	[Name], buyer	[Date]	Not started / in progress / done	Acceptance email or portal status
Legal returned redlines	[Name], buyer	[Date]	Not started / in progress / done	Marked-up contract received
Redlines resolved and final contract issued	[Name], seller	[Date]	Not started / in progress / done	Clean version sent for signature
Vendor registration completed in procurement system	[Name], buyer	[Date]	Not started / in progress / done	Supplier number issued
Signature	[Signatory], buyer	[Date]	Not started / in progress / done	Executed contract returned

Approval chain on the buyer side

Approval	Who gives it	Status	Risk if it has not started
Budget release	[Economic buyer or finance]	[Status]	The deal has a supporter but no money attached.
Security sign-off	[Security owner]	[Status]	A two-week review arrives in the final week.
Legal sign-off	[Legal owner]	[Status]	Redlines restart the commercial conversation.
Procurement	[Procurement owner]	[Status]	Vendor setup adds weeks after everyone has said yes.

Risk log

Risk	Signal you would see	Counter-move	Owner
Single-threaded through the champion	Every answer arrives second-hand	Ask the champion to bring the economic buyer to the next review	[Name]
Signature date rests on buyer intent, not buyer process	Nobody on the buyer side can describe the paper process	Map the approval chain above in the next call	[Name]
Quarter-end discount expectation	Buyer goes quiet as the date approaches	Trade any concession for a term, never for silence	[Name]

Concession ledger

Concession asked	What we trade for it	Approved by	Your entry
[What the buyer asked for]	[The term asked for in return: start date, term length, case study, reference call]	[Name]	
[What the buyer asked for]	[The term asked for in return]	[Name]	

A worked example

Example: fictional company. Dana Okafor is an account executive closing a reporting-platform deal with Keddington Mutual, an insurance firm. The CFO agreed the price on 3 October. The forecast says 14 November. This is her close plan ten days later.

Keddington Mutual: remaining steps on 13 October

Step, written as a verifiable event	Owner (name and side)	Due date	Status	Evidence it happened
Commercial terms approved on our side	Dana Okafor, seller	6 October	Done	Approval on the quote, 6 October
Security questionnaire submitted and accepted	Priya Nair, buyer IT	17 October	In progress	Submitted 10 October; reviewer assigned, no response yet
Legal returned redlines	Keddington legal	24 October	Not started	Contract sent 8 October; legal has not acknowledged receipt
Redlines resolved and final contract issued	Dana Okafor, seller	31 October	Not started	
Vendor registration completed in procurement	Marcus Hale, buyer procurement	7 November	Not started	No supplier number requested yet
Signature	CFO, buyer	14 November	Not started	

What the plan surfaced, and what Dana did about it

Finding	Why it matters	The move
Legal has not acknowledged the contract after five days	The 24 October redline date is a hope, not a plan, and every later date leans on it	Asked the champion to name the lawyer handling it and get a date in writing
Nobody has started vendor registration	At Keddington this takes three weeks, which already lands after the signature date	Asked procurement to open the registration in parallel with legal, not after it
The CFO agreed the price but has not appeared since	Budget release is an approval, not a memory of a meeting	The mutual action plan review on 20 October now has the CFO on the invitation

Example: fictional company. Ferncastle Analytics, Harborview Metrics, Marlow & Finch Logistics and every person named in this example are invented for illustration. Any resemblance to real companies or people is coincidental.

Common mistakes

- **Steps written as intentions:** "Follow up", "align with legal" and "keep momentum" cannot be confirmed or denied, so the plan reads green until the week it turns red. Events, owners, dates.

- **Every owner is on the seller side:** A close plan where you own all the steps is a to-do list, not a plan. Most of the remaining work in a late-stage deal happens inside the buyer, and the plan has to say who is doing it.
- **Discovering the paper process in the final week:** Security review time, legal turnaround and vendor registration are knowable in week one. Teams that ask early close when they said they would; teams that do not, discount to recover time they gave away.
- **Showing the close plan to the buyer:** The buyer-facing version of this document is the mutual action plan. Sharing the internal one, with its risk log and concession ledger, hands over your negotiating position along with the dates.
- **Forecasting from the opinion instead of the plan:** If the steps table says three unowned steps and the forecast says commit, the forecast is quoting a feeling. The honest category is whatever the unfinished rows support.
- **One giant "contract" step:** "Contract" is five steps wearing one name: approval, security, redlines, final issue, signature. Collapsed into one row, four of them have no date and no owner, which is where the slip hides.