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1. **INTRODUCTION**
   1. COMPANY BACKGROUND

Founded by [SPECIFY COMPLETE FOUNDER’S NAME] and [SPECIFY CO-FOUNDER’s NAME] in [SPECIFY COMPANY HEADQUARTERS], [SPECIFY COMPLETE SALES CALL COMPANY NAME] has been providing sales call products and services [OR SPECIFY SALES CALL COMPANY PRODUCTS AND SERVICES, BRAND NAME(S) OR TRADEMARK(S)] for more than [SPECIFY NUMBER OF YEARS] in over [SPECIFY NUMBER] areas in the [SPECIFY STATE OR PROVINCE] of [SPECIFY STATE OR PROVINCE]. [SPECIFY COMPLETE SALES CALL COMPANY NAME] is a [SPECIFY TYPE] company and is a leading authority in the [SPECIFY SALES CALL COMPANY INDUSTRY] industry.

[SPECIFY COMPLETE SALES CALL COMPANY NAME] offers an extensive range of sales call and outsourced product and services including [SPECIFY SALES CALL COMPANY PRODUCT AND SERVICES]. In just over [SPECIFY NUMBER OF YEARS] years, [SPECIFY COMPLETE SALES CALL COMPANY NAME] has established itself in the [SPECIFY COMPLETE SALES CALL COMPANY INDUSTRY] industry. In [SPECIFY YEAR] alone, [SPECIFY COMPLETE SALES CALL COMPANY NAME] achieved $[AMOUNT IN NUMERICAL VALUE] or [SPECIFY AMOUNT IN WORDS] in [SPECIFY CURRENCY] in sales calls [OR SPECIFY]. $[AMOUNT IN NUMERICAL VALUE] or [SPECIFY AMOUNT IN WORDS] in [SPECIFY CURRENCY].

The [OUTSOURCING/CALL CENTER] industry is one of the fastest growing industry in the market today. With the the rise of today’s technology and the growing popularity of digital media, the [SPECIFY SALES CALL COMPANY MARKET] remains consistent in its growth.

* 1. **COMPANY MISSION**

It is the mission of [SPECIFY SALES CALL COMPANY NAME] to deliver sales call products and services to [SPECIFY SALES CALL COMPANY TARGET MARKET] in [SPECIFY AREA(S) OR LOCATION(S) COVERED)].

* 1. **COMPANY VISION**

[SPECIFY SALES CALL COMPANY NAME] strives to deliver outstanding sales call solutions [OR SPECIFY] with highly skilled sales call professionals with guaranteed customer satisfaction rates.

* 1. **COMPANY OBJECTIVES**

[SPECIFY SALES CALL COMPANY NAME] aims to achieve the following objectives within [SPECIFY TIME PERIOD OR PROJECT TIMELINE]:

By [SPECIFY TIME UNIT] [NUMBER], [SPECIFY SALES CALL COMPANY NAME] will achieve a total of $[AMOUNT IN NUMERICAL VALUE] or [SPECIFY AMOUNT IN WORDS] in [SPECIFY CURRENCY] net profit.

By [SPECIFY TIME UNIT] [NUMBER], [SPECIFY BUSINESS PROJECT COMPANY PROJECT NAME]will achieve a total of $[AMOUNT IN NUMERICAL VALUE] or [SPECIFY AMOUNT IN WORDS] in [SPECIFY CURRENCY] in sales and marketing [OR SPECIFY].

By [SPECIFY TIME UNIT] [NUMBER],[SPECIFY BUSINESS PROJECT COMPANY PROJECT NAME]will raise a total of $[AMOUNT IN NUMERICAL VALUE] or [SPECIFY AMOUNT IN WORDS] in [SPECIFY CURRENCY] for [SPECIFY BUSINESS PROJECT COMPANY FUND RAISING]

By [SPECIFY TIME UNIT] [NUMBER], [SPECIFY SALES CALL COMPANY NAME] aims to achieve [SPECIFY NUMBER OF PERCENTAGE]% customer satisfaction with [SPECIFY BUSINESS PROJECT COMPANY NAME PRODUCTS AND SERVICES] products and services.

1. **PRODUCTS AND SERVICES**

[SPECIFY COMPLETE SALES CALL COMPANY NAME] offers the following products and services:

|  |  |
| --- | --- |
| **Sales Call Product:** | **Price per [SPECIFY UNIT]** |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |

Table 2.0.1 Sales Call Product

|  |  |
| --- | --- |
| **Sales Call Services** | **Price per [SPECIFY UNIT]** |
| [SPECIFY NAME OF PROJECT SERVICE] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT SERVICE] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT SERVICE] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT SERVICE] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT SERVICE] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT SERVICE] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |
| [SPECIFY NAME OF PROJECT PRODUCT] | $[SPECIFY AMOUNT] |

Table 2.0.1 Sales Call Product

* 1. **INDIVIDUAL DAILY SALES CALL REPORT FORM**

This form shall be filled up by every [SPECIFY SALES CALL COMPANY NAME] employee on a daily basis whenever making a call. This form shall be submitted to [SPECIFY IMMEDIATE SUPERVISOR NAME] for documentation and quality assurance [OR SPECIFY] purposes. Furthermore, this form shall be submitted on or before [SPECIFY TIME] every [SPECIFY FREQUENCY].

|  |  |  |
| --- | --- | --- |
| Employee Name: [SPECIFY EMPLOYEE NAME] | Manager: [SPECIFY COMPLETE MANAGER NAME] | Date: [SPECIFY COMPLETE DATE] |
| **CUSTOMER / CLIENT INFORMATION** | | |
| Name: [SPECIFY CLIENT OR CUSTOMER COMPLETE NAME] | | Role: [SPECIFY ROLE] |
| Organization: [SPECIFY CLIENT OR CUSTOMER COMPLETE ORGANIZATION NAME] | | Contact Number:  [SPECIFY CONTACT NUMBER] |
| **CALL INFORMATION** | | |
| Date: [SPECIFY COMPLETE DATE] | Prep Notes:  [SPECIFY PREP NOTES DETAILS] | |
| Start Time: [SPECIFY START TIME] |
| Call duration: [SPECIFY CALL DURATION] |
| **CALL SUMMARY** | | |
| [SPECIFY CALL SUMMARY DETAILS] | | |
|
|
|
| OUTCOME | | |
| Follow up: [YES] [NO] | Follow Up Date: [SPECIFY FOLLOW UP DATE] | |
| Comments: [SPECIFY COMMENT(S) DETAILS HERE] | | |
|
|
|
|

* 1. **DAILY SALES REPORT**

Every [SPECIFY SALES CALL COMPANY NAME] employee must have his or her Daily Sales Report to monitor day-to-day sales. This form shall be submitted to [SPECIFY IMMEDIATE SUPERVISOR NAME] for documentation and quality assurance [OR SPECIFY] purposes. Furthermore, this form shall be submitted on or before [SPECIFY TIME] every [SPECIFY TIME UNIT].

|  |  |  |  |
| --- | --- | --- | --- |
| Employee’s Name: | | | Date: |
| **PHONE CALLS MADE** | | | |
| **Name:** | **Company:** | **Contact Number:** | **Sales Result:** |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |
| [SPECIFY COMPLETE NAME] | [SPECIFY COMPLETE COMPANY NAME] | [SPECIFY COMPLETE CONTACT NUMBER] | [SPECIFY SALES RESULT DETAILS] |

* 1. **WEEKLY SALES REPORT FORM:**

A Weekly Sales Report shall be generated for every [SPECIFY SALES CALL COMPANY NAME] employee to monitor sales in a weekly basis. This form shall be submitted to [SPECIFY IMMEDIATE SUPERVISOR NAME] for documentation and Quality Assurance [OR SPECIFY] purposes. Furthermore, this form shall be submitted on or before [SPECIFY TIME] every [SPECIFY TIME UNIT].

|  |  |
| --- | --- |
| **WEEK [SPECIFY NUMBER] [SPECIFY TIME UNIT] [SPECIFY DATE] to [SPECIFY DATE]** | |
| **Employee Name:** | **Sales:** |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |

|  |  |
| --- | --- |
| **WEEK [SPECIFY NUMBER] [SPECIFY TIME UNIT] [SPECIFY DATE] to [SPECIFY DATE]** | |
| **Employee Name:** | **Sales:** |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |

|  |  |
| --- | --- |
| **WEEK [SPECIFY NUMBER] [SPECIFY TIME UNIT] [SPECIFY DATE] to [SPECIFY DATE]** | |
| **Employee Name:** | **Sales:** |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |

|  |  |
| --- | --- |
| **WEEK [SPECIFY NUMBER] [SPECIFY TIME UNIT] [SPECIFY DATE] to [SPECIFY DATE]** | |
| **Employee Name:** | **Sales:** |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |

* 1. **MONTHLY SALES REPORT FORM:**

The [SPECIFY ASSIGNED PERSON] shall generate a Monthly Sales Report for every [SPECIFY SALES CALL COMPANY NAME] employee to monitor sales per month. This form shall be submitted to [SPECIFY IMMEDIATE SUPERVISOR NAME] for documentation and quality assurance [OR SPECIFY] purposes. Furthermore, this form shall be submitted on or before [SPECIFY TIME] every [SPECIFY TIME UNIT].

|  |  |
| --- | --- |
| **MONTH [SPECIFY MONTH] [SPECIFY TIME UNIT] [SPECIFY DATE] to [SPECIFY DATE]** | |
| **Employee Name:** | **Sales:** |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |

* 1. **QUARTERLY SALES REPORT FORM:**

A Quarterly Sales Report shall be furnished for each [SPECIFY SALES CALL COMPANY NAME] employee to monitor quarterly sales and shall be submitted to [SPECIFY IMMEDIATE SUPERVISOR NAME] for documentation and Quality Assurance [OR SPECIFY] purposes. Furthermore, this form shall be submitted on or before [SPECIFY TIME] every [SPECIFY TIME UNIT].

|  |  |
| --- | --- |
| **MONTH [SPECIFY MONTH] [SPECIFY TIME UNIT] [SPECIFY DATE] to [SPECIFY DATE]** | |
| **Employee Name:** | **Sales:** |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |
| [SPECIFY COMPLETE EMPLOYEE NAME] | [NUMBER UNIT(S) SOLD] |

* 1. **DAILY CALL TIME AVERAGE**

Calls made by employees of [SPECIFY SALES CALL COMPANY NAME] are monitored by [SPECIFY ASSIGNED PERSON] for [SPECIFY] purposes and to assure quality is achieved in each call made. An employee is given a minimum [OR SPECIFY] of [SPECIFY TIME UNIT] for each call and shall have an average of [SPECIFY NUMBER] of [SPECIFY TIME UNIT] in a [SPECIFY DAILY MONTHLY] basis.

|  |  |  |
| --- | --- | --- |
| **Employee Name** | **Call Duration** | **Call Duration Average** |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |
| [SPECIFY EMPLOYEE NAME] | [SPECIFY NUMBER OF MINUTES] | [SPECIFY NUMBER OF MINUTES] |

1. **FINANCIAL SUMMARY**
   1. **PROJECTED BALANCE SHEET**

[SPECIFY SALES CALL COMPANY NAME]’s balance sheet is expected to accumulate in an amount of $[AMOUNT IN NUMERICAL VALUE] or [SPECIFY AMOUNT IN WORDS] in [SPECIFY CURRENCY]

in the cash balance by the end of [SPECIFY YEAR].

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Pro Forma Balance Sheet** | |  | **[SPECIFY YEAR]** | **[SPECIFY YEAR]** | **[SPECIFY YEAR]** |
|  | **Assets** | | | | |
| Current Assets | |  |  |  |  |
| Cash | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Other Current Assets | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Total Current Assets | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
|  |  | | | | |
| Long-term Assets | |  |  |  |  |
| Long-term Assets | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Accumulated Depreciation | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Total Long-term Assets | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Total Assets | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
|  |  | | | | |
| Liabilities and Capital | |  | [SPECIFY YEAR] | [SPECIFY YEAR] | [SPECIFY YEAR] |
|  | **Current Liabilities** | | | | |
| Accounts Payable | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Current Borrowing | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Other Current Liabilities | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Subtotal Current Liabilities | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Long-term Liabilities | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Total Liabilities | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
|  |  | | | | |
| Paid-in Capital | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Retained Earnings | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Earnings | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Total Capital | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Total Liabilities and Capital | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
|  |  | | | | |
| Net Worth | |  | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |

TABLE: Balance Sheet

* 1. **PROJECTED PROFIT AND LOSS**

The sales for [SPECIFY YEAR], [SPECIFY YEAR], and [SPECIFY YEAR] are $[SPECIFY AMOUNT], $[SPECIFY AMOUNT], and $[SPECIFY AMOUNT] respectively. The net profit for this certain period is $[SPECIFY AMOUNT], $[SPECIFY AMOUNT], and $[SPECIFY AMOUNT], respectively, with net profit/sales of [PERCENTAGE] %, [PERCENTAGE] %, and [PERCENTAGE] %, each month.

|  |  |  |  |
| --- | --- | --- | --- |
| **Pro Forma Profit and Loss** | | | |
|  | [SPECIFY YEAR] | [SPECIFY YEAR] | [SPECIFY YEAR] |
| Sales | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Direct Cost of Sales | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Other Costs of Sales | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Total Cost of Sales | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Gross Margin | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Gross Margin % | [PERCENTAGE] % | [PERCENTAGE] % | [PERCENTAGE] % |
| **Expenses** | | | |
| Payroll | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Marketing/Promotion | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Depreciation | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Repair & Maintenance | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Web Design | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Instructor and Class Room Costs | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Total Operating Expenses | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
|  | | | |
| Profit Before Interest and Taxes | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| EBITDA | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Interest Expense | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Taxes Incurred | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
|  | | | |
| Net Profit | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] | $[SPECIFY AMOUNT] |
| Net Profit/Sales | [PERCENTAGE] % | [PERCENTAGE] % | [PERCENTAGE] % |

TABLE: Profit and Loss