

MODULE 1: REFINING YOUR ANNUAL SALES PLAN

An accountability tool for sales managers

Each week your sales reps participate in sales training and learn vital selling behaviors, attitudes, skills and knowledge (BASK). Without support and accountability from their manager the material will get learned, but not applied. Follow the below instructions to help them apply what they learn so they can achieve better results from their selling efforts.

INSTRUCTIONS:

- 1) Below is a summary of the core concepts that were covered in **Module 1: Refining Your Annual Sales Plan**.
- 2) Review the list below and select which ones to discuss with each sales rep during your weekly 1-2-1 coaching meeting.

CONCEPT 1: CLEAR ANNUAL GOALS

- Does your sales rep understand their annual sales revenue goal?
- Do they understand how much in total new business they need to produce to achieve their annual sales revenue goal?

CONCEPT 2: CLEAR SELLING PROCESS

- Does your sales rep have a clear understanding of the different selling stages of the selling process?
- Do they understand their own conversion rates from lead to proposal and proposal to close?

CONCEPT 3: CLEAR SALES ACTIVITY NUMBERS

- Does your sales rep understand how many new appointments, new proposals and new sales they need each week and month to achieve their annual sales revenue goal?
- Have they summarized their sales plan and given you a copy of it?
- Have you reviewed their sales plan with them and discussed what challenges or obstacles they may run into?

CONCEPT 4: USING A SALES ACTIVITY SCOREBOARD

- Does your sales rep have a simple scoreboard that displays their sales revenue goal and selling activity goals?
- Is this scoreboard visible and easily updated each week?

ACCOUNTABILITY
is the glue that ties
COMMITMENT
to **RESULTS**

- Will you commit to review their scoreboard each week with them?