

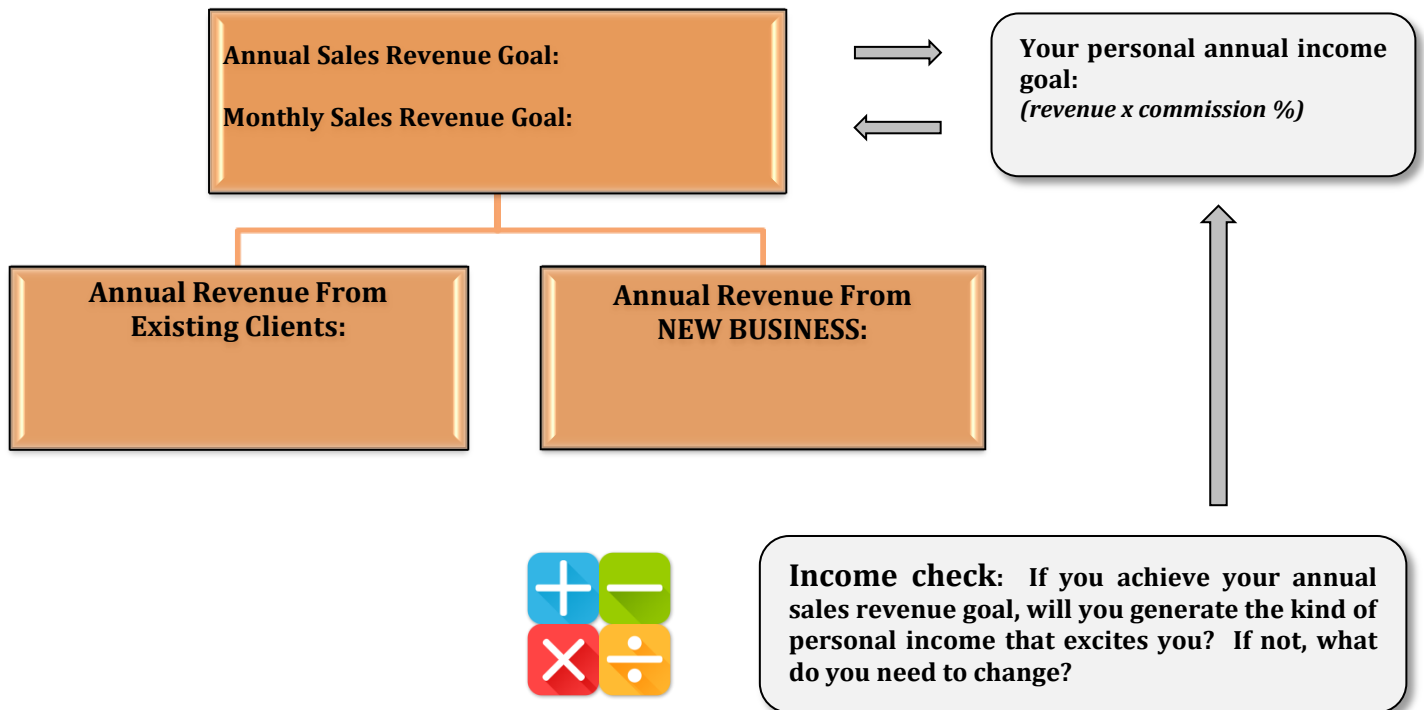
REFINING YOUR ANNUAL SALES PLAN

List what are your company's top sales goals for this year:

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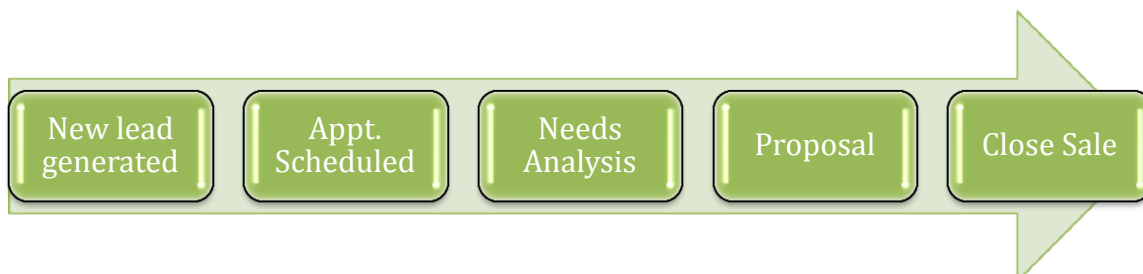


SALES REVENUE GOAL



SALES PROCESS MAP

A Sales Process Map is a simple diagram that illustrates the various steps a “prospective customer” goes through before they become a paying “client”. See the example below.



Do you have other selling stages that need to be considered in this sales process map?

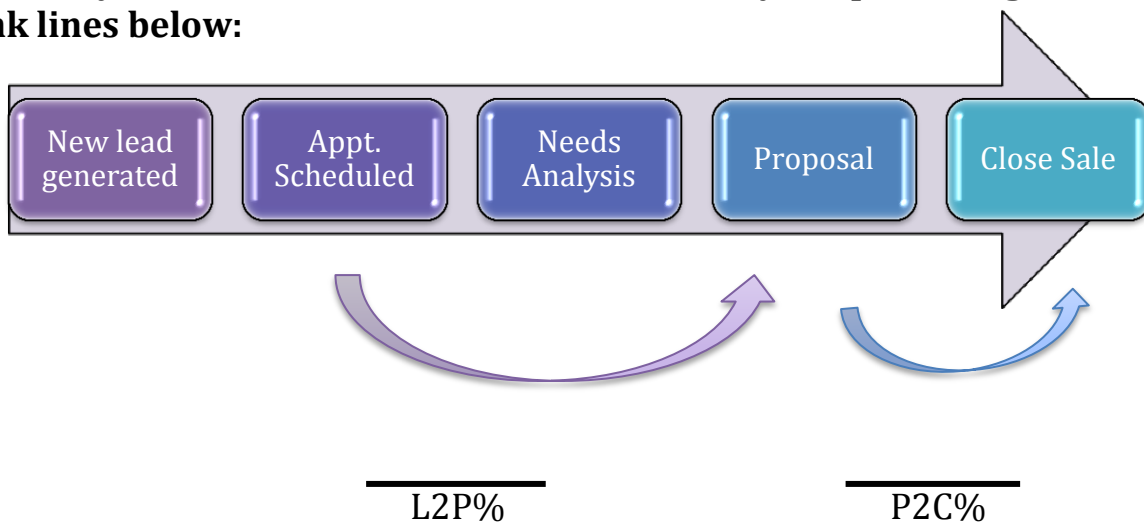
BUILDING YOUR SALES PLAN

Time to gather some important data that will help us build a sales plan...

What is your average order value (AOV) or average transaction value (ATV)?

(Total monthly sales revenue divided by total # of transactions)

What are your “sales conversion ratios”? Write your percentages on the blank lines below:



- **Proposal-to-Close Ratio (P2C%):** If you submit 10 “Proposals”, how many will convert into sales within 30 days?
- **Lead-to-Proposal Ratio (L2P%):** If you generate 10 “Leads”, how many will convert into proposals within 30 days?

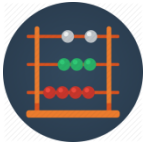


How many “average” sales transactions do you need to close each month to achieve your monthly sales revenue goal? *(Monthly sales revenue goal divided by AOV)*

How many “Proposals” do you need to submit in order to “close” the above listed number of sales each month? (# of monthly sales transactions divided by 0.X, where X = P2C%)



BUILDING YOUR SALES PLAN CONT.



How many “Appointments” do you need to schedule in order to submit the correct number of Proposals each month? *(# of monthly proposals divided by $0.X$, where $X = L2P\%$)*

Complete the following:

- # of appointments scheduled per month:
- # of appointments scheduled per week:
- # of appointments scheduled per day:



SUMMARIZE YOUR SALES PLAN BELOW:



What challenges will you face in accomplishing this sales plan this year?

What changes do you need to make in order to achieve these daily and weekly numbers?

SOURCES FOR NEW BUSINESS

Who is the most important group for you to schedule sales appointments with to reach your goal? Write the number of appointments you will schedule for each group each week:

Past Clients:

Current Clients:

New Business:

SALES ACTIVITY TRACKING & ACCOUNTABILITY

Creating Your Sales Activity Scoreboard

Where can you visibly display your sales revenue goal?

What sales activities/behaviors will you measure each week?

-
-
-

What tool / resource will you use to track these?

-

Will your weekly scoreboard show whether you're getting closer to your goal or farther away?

Creating Sales Accountability

Who will meet with you on a weekly basis to review your scoreboard?

AGENDA:

- Account for last weeks commitments
- Review scoreboard and learn from experiences
- Make a plan for the upcoming week by asking this question:

"What are the 1 or 2 high impact things I can do this week that will make the biggest difference for my performance on the scoreboard?"

LESSONS LEARNED

HOMEWORK ASSIGNMENT:

- Summarize your sales plan into a simple paragraph.
- Email a copy of your sales plan to your sales manager.
- Review your score board with your sales manager on a weekly basis.
- Report on your progress towards your annual goal on a monthly basis.

EVALUATE: Summarize what you learned:

What will you commit to this week?

- I will START:
- I will STOP:
- I will CONTINUE: