

SALES ACTION PLANNING PLAYBOOK

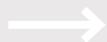
SALES ACTION PLANNING PLAYBOOK

This playbook lays out a four-step process to help you more easily achieve your personal goals.



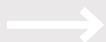
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Set Personal Goals



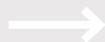
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Determine Additional Business Needed



3

Make Activity Commitments



4

Analyze Progress

STEP 1: Setting Personal Goals

Sadly, not enough salespeople set goals and have a written plan to achieve them. We know this from analyzing data on about 600,000 salespeople¹. In reviewing the statistics, those salespeople who do set goals along with creating a written plan to achieve them are:

33% more motivated

22% more likely NOT to make excuses

20% more comfortable discussing money

20% more proficient hunting

19% better selling consultatively

18% better following a repeatable sales process

17% better selling value

To enable any type of effective sales action planning, you must first set goals, then establish a plan of attack. Most highly successful salespeople do in fact set personal goals and have a plan to achieve them. The following is a visual of an easy-to-follow goal setting process.

¹ Data compliments of Objective Management Group, January 2020

GOAL SETTING PROCESS



The following short Goal Setting Exercise is a great starting point and will help you begin the process of setting your personal goals.

GOAL SETTING EXERCISE

1. Think out 10 years from now:

Describe the house you live in.



.....

What is your family situation?



.....

What is in your garage?



2. If money were not an object, what would you do with your time:

If you had one hour?

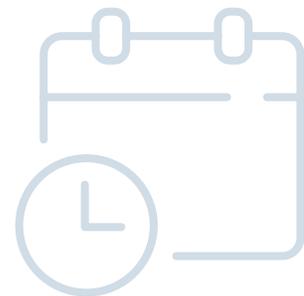
If you had one day?

If you had one week?

If you had one month?

If you had one year?

3. What does this tell you about what's important to you?



4. List One Dream Goal – Not an unattainable goal but something that is important to you. It is okay if it is a stretch to achieve but be slightly realistic. Also list what the cost to achieve that goal is in dollars. Remember, it may take time to accumulate the money necessary to achieve your goals.



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5. List a Second Dream Goal. List the cost to achieve that goal.



-
6. How much more income is needed to acquire each, remembering it will take time to accumulate this income?



STEP 2: Determine the Needed Business to Support Your Goal Achievement

Now that you have your goals established, the next step is to create the plan that will help you reach them.

While your goals may not be specifically money-oriented, you likely need to generate more income to achieve your goals. The Math of Success will help you calculate how many first appointments you need each week to generate enough closed business to increase your income.

Complete this form to calculate how many first appointments or discovery conversations you will need to achieve your goals.

MATH OF SUCCESS

A	What is your annual sales goal:	
B	Break it down into Monthly Sales Goal: <i>(Divide A by 12)</i>	
C	Determine your average sale size and enter it here:	
D	Determine how many closed sales needed per month: <i>(Divide B by C)</i>	
E	Determine your closing ratio and enter here: <i>(Example: I close 3 deals for every 10 initial meetings. Enter as a decimal value. Example: $3/10 = .3 = 30\%$ closing ratio.)</i>	
F	Work backward to determine number of first meetings necessary to produce an adequate number of opportunities per month: <i>(Divide D by E. Calculation is rounded.)</i>	
G	Calculate weekly number of first meetings required: <i>(Divide F by 4.25. Calculation is rounded.)</i>	

STEP 3: Make Activity Commitments

This step requires discipline but will enable you to reach your personal goals by doing what is necessary every day, week and month in your role as a salesperson to reach them. This works for everything, not just sales, by the way.

In sales, there are numerous activities you can spend your time on each day. If you have your personal goals firmly in mind and know how much you need to sell to accomplish them, then it is easier to prioritize which activities will actually help you reach your goals.

The objective is to prioritize only those activities that will get you enough first appointments or discovery conversations each week, to produce enough closed opportunities to fuel your income.

Here is a list of items you could choose to focus on. Feel free to add your own. Be sure to insert the number you will commit to completing each week of each type of activity. It makes most sense to have between three and five types of activities upon which you will focus.

POSSIBLE ACTIVITIES TO PRODUCE 1st MEETINGS	WEEKLY NUMBER
Face-to-face referral or introduction request	
Phone referral or introduction request	
LinkedIn referral or introduction request	
Cold email prospecting	
Face-to-face cold calling	
Phone cold calling	

→ **STEP 4: Analyze what's working and what is not.**

Be willing to adjust as necessary to keep moving forward toward your goals.

Follow this plan:

- **Prioritize** the listed activities in Step 3 above other less important tasks.
- **Review** your progress on a weekly basis.
- **Examine** why you haven't completed the activities you committed to, if that is the case. Determine how to avoid these pitfalls in the future.
- **Establish** a relationship with an accountability partner (friend, co-worker, manager, etc.). Knowing that someone else will be checking in on your progress may cause you to keep your word to yourself about your activity commitments.

Now that you have established your goals and calculated what you must do to achieve them, commit to your success. In the words of Abraham Lincoln:

"Discipline is choosing between what you want now, and what you want most."

Choose what you want most. Good luck!



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