**Goals**

In the table below, list sales goals for the year, broken down by quarter. The columns marked “Goal” indicate the goal for that time period and the columns marked “Actual” state what was actually accomplished.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Metric | Yearly Goal | YTD / Actual | Q1 Goal | Q1 Actual | Q2 Goal | Q2 Actual | Q3 Goal | Q3 Actual | Q4 Goal | Q4 Actual |
| Sales | $2000k | $505k | $400k | $395k | $425k |  | $650K |  | $525k |  |
| Quoted $$ | $5000k |  | $1100k |  | $1400k |  | $1250k |  | $1250k |  |
| RAR | $150k |  | $35k |  | $30k |  | $45k |  | $40k |  |
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**Best Practices**

Below are the top five best practices to pay special attention to this year. These best practices can be specific areas of improvement, changes needed to make, or initiatives that are critical to succeeding. Limit this list to five to ensure focus and attention.

1. I will update my CRM at the end of the day and my pipeline weekly.

2. I will be early for every meeting – internal and external.

3.

4.

5.

**Account Management and Success**

Protecting and growing current accounts is the baseline of the annual sales plan. The accounts are separated into three types: Key Accounts, Focused Accounts, Other Accounts. Below is a detailed plan for Key Accounts and a general plan for Focused Accounts. Other Accounts will be responded to in a professional way but will not be part of this plan.

**Key Accounts Projections.** Key Accounts are typically one to three accounts that generate most sales for a salesperson. This number can differ from person to person, but the absolute objective of identifying Key Accounts for all salespeople is to focus on the accounts that will generate the most sales.

In the table below, list every Key Account, the average amount of sales over the last three years, this year’s goal, and a high-level plan on what will be done to reach the goal for this year. There is also a column to include year-to-date (YTD) sales during accountability meetings.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Account Name | 3-Year Sales Avg. | 2022 Goal | YTD / Actual | High-Level Plan (two to three sentences) |
| Downtown Healthcare | $657k | $725k |  | Work with upper management to get a deeper intro into the IT department. Prove our pro services with IT. |
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**Focused Accounts.** Focused Accounts include all the current customer accounts that make up the next tier of clients. There are usually three to six times the number of Focused Accounts as Key Accounts. After determining both Key Accounts and Focused Accounts, there will likely be dozens of Other Accounts not listed in this plan. It’s common for Other Accounts to significantly outnumber the total of Key Accounts and Focused Accounts. The purpose of this plan is to ensure that the appropriate time and attention is paid to the current accounts that can generate the most sales this year.

Below is a table that lists all Focused Accounts, and another table that lists ideas that will enable proactively staying in front of these Focused Accounts and maximize our sales.

|  |  |  |
| --- | --- | --- |
| Account Name | Account Name | Account Name |
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| Idea 1: | Personal visit to each of these accounts twice a year.  |
| Idea 2: | Invite as VIP to our technology summit. |
| Idea 3: |  |
| Idea 4: |  |
| Idea 5: |  |

**Business Development**

**Targeted New Prospects.** Below is a list of prospective accounts that are worth pursuing. Each column represents a step in the process of moving an account from being a Prospect with no relationship to a Client that has made at least one purchase. The status is shown by filling in the appropriate squares with either a color or symbol (e.g., x).

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Targeted New Prospect | Attempting Contact | Connected | Call / Meeting | Delivered Quote | Purchased |
| ABC Logistics |  |  |  |  |  |
| CNL Bank |  |  |  |  |  |
| DBCC |  |  |  |  |  |
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**Networking Plan.** In the tables below, complete as many of the cells as appropriate for your strategy. Feel free to add rows if needed but be sure to keep your strategic targets limited to a manageable number. It’s better to grow deep relationships with five people than shallow relationships with twenty people.

|  |
| --- |
| Associations / Groups |
| Organization | Strategy / Notes |
| Local Rotary | Run for an office and speak at least twice. |
|  |  |
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| Contractors |
| Organization | Strategy / Notes |
| High Value GC | Grow relationship with Melanie. |
|  |  |
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| A&E Firms and Consultants  |
| Firm / Consultant | Strategy / Notes |
| JJC | At least three lunch and learns to their design team. |
|  |  |
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| --- |
| Trade Shows / Exhibits / Partner Events |
| Event | Location | Strategy / Notes |
| Local ASIS Showcase | Hilton | Partner with two to three manufacturers. |
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**Implementation**

**Monthly Accountability Stand-Up Meetings.** Following every month, meet with an Accountability Partner – preferable a supervisor - and conduct a review of progress in the four areas of the plan. The salesperson should grade each of the four sections as Ahead, On Track, or Behind; and then offer thoughts and ideas to improvement.

In the table below, the Accountability Partner should sign their initials to indicate that they have discussed each section respective section. For the months that coincide with the Quarterly Accountability Meetings, one meeting will suffice.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Goals | Best Practices | Account Management & Success | Business Development |
| January |  |  |  |  |
| February |  |  |  |  |
| March |  |  |  |  |
| April |  |  |  |  |
| May |  |  |  |  |
| June |  |  |  |  |
| July |  |  |  |  |
| August |  |  |  |  |
| September |  |  |  |  |
| October |  |  |  |  |
| November |  |  |  |  |
| December |  |  |  |  |

**Quarterly Accountability Meetings.** These meetings dive deep into each section, understanding the details of progress for each. This meeting should last 60 – 90 minutes. Following each quarterly meeting, the Accountability Partner will complete comments in the tables below, with initials from both.

|  |
| --- |
| Quarter 1 |
| Section | General Comments | Partner  | Salesperson  |
| Goals | On track with sales but falling quite a bit behind on the metrics that lead to sales. Need to balance activity throughout the remainder of the year. |  |  |
| Best Practices | Doing fantastic on the changes of behavior for the year. The only challenge is with the promise of four hours of prospecting per week. Doing none on many weeks. |  |  |
| Account Management & Success | Concern about Big and Mighty Automotive. Twenty-five sites up for renewal at the end of the year – need to do Vision Meeting by July. |  |  |
| Business Development | Very weak. Must start working immediately on prospecting and networking. Pipeline will dry up by Q3. |  |  |
| Overall Performance | Working very hard and doing amazing job on changing some of the behaviors through best practices. However, still not doing the prospecting that is necessary to sustain success.  |  |  |

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| Quarter 2 |
| Section  | General Comments | Partner  | Salesperson  |
| Goals |  |  |  |
| Best Practices |  |  |  |
| Account Management & Success |  |  |  |
| Business Development |  |  |  |
| Overall Performance |  |  |  |

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| --- |
| Quarter 3 |
| Section  | General Comments | Partner  | Salesperson  |
| Goals |  |  |  |
| Best Practices |  |  |  |
| Account Management & Success |  |  |  |
| Business Development |  |  |  |
| Overall Performance |  |  |  |

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| --- |
| Quarter 4 |
| Section  | General Comments | Partner  | Salesperson  |
| Goals |  |  |  |
| Best Practices |  |  |  |
| Account Management & Success |  |  |  |
| Business Development |  |  |  |
| Overall Performance |  |  |  |