



**ACTIVITY/GOAL SETTING**

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

**\*#1-#3 ARE GROSS (BEFORE TAX)**

*Fill in all information that can be applied in your business.  
For questions that don't apply, write 'n/a'.*

1) YEARLY/MONTHLY INCOME (not company goal, yours): \$ \_\_\_\_\_ \$ \_\_\_\_\_

2) MONTHLY SALARY (IF APPLICABLE) \$ \_\_\_\_\_

3) GROSS MONTHLY INCOME (minus salary) TO MEET ANNUAL/YTD INCOME GOAL: \$ \_\_\_\_\_

3a) #3 income figure then subtract taxes. Not sure what bracket? 20% is a safe estimate \$ \_\_\_\_\_

4) AMOUNT OF AVERAGE SALE: \$ \_\_\_\_\_ (If Annual Sale, Break down Monthly)

5) PERCENTAGE OF COMMISSION PAID: \_\_\_\_\_%

6) AVERAGE COMMISSION: \$ \_\_\_\_\_

7) NUMBER OF SALES\* NEEDED MONTHLY TO MEET YOUR MONTHLY INCOME: \_\_\_\_\_

\* Use number in 3a.

**PROSPECTING SOURCES-** These are what the salesperson is using to produce prospects. These are only examples. Use whatever you/they deem important.

**YOUR ACTIVITY GOALS**

Prospecting Activity Goal	Weekly Goal	Monthly Goal
Cold Calling (phone)		
Cold Calling (in person)		
Networking Group/Event		
Strategic Alliance		
Existing Clients		
Past Clients		
Other		
Other		

**SAMPLE**

\* Remember, this is for one week. The columns are independent of each other

**Sales Funnel Weekly Tracking**  
**Week of 6/22**

Activity Results	Pre-Qual. Calls (List Name)	CNS	Appointment (pain/inv./if-then)	CNS	Recap-Email	Recommendations	CI/CNS
<b>Monday</b>	ABC Corp.	6/29	Star Manuf.		yes	Lassiter - Mayer	CL
	Fleetwood Mnf.	6/25	Column inc.		Will do am		
	Johnson LLC.	6/24					
	SmithCo	6/23					
<b>Tuesday</b>	Club Corp	7/12	SmithCo	x		Profit and Wild	6/24
	Forrest- Ranny Ip	6/31					
	Pours Colonial	7/8					
	Amanda origins	6/30					
	Rob Columbus Inc	6/26					
<b>Wednesday</b>	Networking meet	x	Johnson llc	x	yes		
	Country Ins.	7/7	Corpus, Stanley				
	Star Systems	6/28	Boardroom llc.				
<b>Thursday</b>	Race Ratings	7/27	S/A – June Floveer				
	Cool Flyers, inc.	7/8	Fleetwood Manuf.	x	In the am		
	Harrison/Fields	7/19					
<b>Friday</b>	Popart llc.	7/29	S/A Carry Moss				
	Corvelle Systems	6/30	Rob Columbus			Corin Org.	No
	Childress-Oak	7/2	AFS Meeting				
	Columbia Pria	6/29					
	Plyer, Tyler inc.	7/6					
	Gerard and Bell	8/2					

Daily/weekly goals met? Yes

**Sales Funnel Weekly Tracking**  
 Week of \_\_\_\_\_

Activity Results	Pre-Qual. Calls (List Name)	CNS	Appointment (pain/inv./if-then)	CNS	Recap-Email	CNS	Recommendation
<b>Monday</b>							
<b>Tuesday</b>							
<b>Wednesday</b>							
<b>Thursday</b>							
<b>Friday</b>							