

# Activities Goal Setting Worksheet

## Explanation

Are you doing your activities to build your business? Most would say yes but unless they are written down, they are most likely not truly happening.

This explanation of how to use your goals sheet will help you set it up for YOU! No one else!! Remember you need to do the Personal Financial Goal Sheet first. If you haven't done that yet, work on that and then come back to here;

<http://www.schulzbusiness.com/pdf/book-pdfs/GoalFin1.pdf>

- 1) This is your income goal that you *want* to achieve. It is broken down annually as well as monthly. This number should come from your Personal Financial Goal Sheet.
- 2) Your monthly salary will be put here and deducted since you cannot control that number. If this number is actually a draw then put N/A since a draw is basically paid in advance until you reach your number, it is not necessarily additional money.
- 3) Put the number here that you need monthly to reach that goal. (remember to subtract salary if applicable).
- 4) The amount of your average sale. This is only average. You may sell different services or products that have a range of cost. Try to take an average of what that sale *should* be.
- 5) The percentage you are paid on a sale. Again this is average since some things you sell may have a higher or lower percentage associated with them.
- 6) Your average commission dollars based on the average sale multiplied by the average commission percentage.
- 7) Now figure the total number of sales needed to make your income goal, *not just the company goal but yours!* (refer to 3a)

Below are how you are going to get there, by prospecting. You can do several different things to prospect and should. There should be a mix of prospecting activities.

The “goals” here are the quantity of which you have committed to do in each category. It is not a dollar goal for each. The idea is setting activity goals you can CONTROL.

YOU can control the amount in each of these activities that you do. You cannot control the results of them. That comes from tracking them!!

\*\* Note-These will be “guesstimates” since we can only suppose what the number of prospecting activities you need.

### **Prospect/Appointment Sources;**

*Below is what you should come out with once you fill these out. For example only;*

- *I have committed to \_\_\_\_\_ appointments/dials for Cold Calling **this month.***
- *I have committed to attending \_\_\_\_\_ (networking meetings) \_\_\_\_\_ times **this month** in order to make St. Alliance meetings from networking **this month***
- *I have committed to \_\_\_\_\_ appointments with Existing Clients (additional business) **this month.***
- *I have committed to \_\_\_\_\_ appointments with other Strategic Alliances **this month.***
- *I have committed to \_\_\_\_\_ appointments from Other; \_\_\_\_\_ **this month***

### **Sales Funnel Weekly Tracking;**

The activity results are what you are tracking once you get to the first step in the process, typically a pre-qualification/engagement conversation. Even if you don’t move to an appointment, this conversation should be tracked.

\*\* NOTE- These columns are independent of each other! For example you may have ABC Company in the pre-qual/engagement stage with a CNS. Then under Appointment you may have XYZ Company. It doesn’t necessarily move one company at a time since most of the time these things wont happen on the same day.

*\*\*CNS is Clear Next Step and that is the Next step that you BOTH have agreed upon that will move the potential sale forward. Create a date and time in this spot. This will be at the end of every step!!*

The appointment is your actual appointment. This will typically be in-person but doesn’t need to be. You must cover discussions of pain, Investment and IF/Then at some level or you aren’t ready to move on to your next step. (recap email should ALWAYS accompany your appointment!)

Your Recap email will happen here and will be a summary of all that the prospect told you plus all of the mutually agreed steps that each of you have committed to in writing to move on.

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The recommendations is you form of the Presentation or Proposal. You should not be doing this step unless you have a very clear understanding of the 3 previous agreements we discussed; pain or issues you can solve and understating clearly what they are, have had some level of investment conversations and everyone is in agreement and what will happen if you present and they are happy with your recommendations. DON'T ASSUME HERE!!

Make copies (or request excel version) and use them every week. The key is tracking where things are coming from. Don't assume, track!