

Performance ProView™ Plan

for

How many times have you come to the end of a year and asked yourself, how could I have missed my sales objectives by so much . . . again? Where did I get off track? How did I get so far off track? Or maybe you say to yourself, “I told them that my forecast was unrealistic, there was no way I could hit that number.” Sound familiar?

Now, maybe for the first time you have an opportunity to develop your forecast and a specific plan to help you achieve your objectives. The Performance ProView™ Plan is a plan that is developed by you and worked in conjunction with the support and coaching of your sales manager.

Your success as a sales professional is determined by your ability to excel in four key areas. They are:

1. Customer and Territory Development
2. Product and Industry Knowledge
3. Selling Expertise
4. Self-Development

Depending on your experience level, background, and the number of years you have been a sales professional, your answers will vary dramatically. The Performance ProView™ Plan is all about developing a program that is broken down into doable, measurable weekly objectives. Obviously, if you are not achieving your weekly objectives you are going to miss your monthly, quarterly and yearly objectives as well. Sounds basic doesn't it? You would be surprised at how many sales professional get towards the end of the year and can't believe they missed the target again. Missing your annual target is simply a matter of failing to hit the weekly, monthly, and quarterly objectives. The sooner you begin to achieve your weekly goals the faster you will move toward achieving your overall goals. The Performance ProView™ Plan was developed with the flexibility to make adjustments sooner instead of later.

Please allow yourself adequate time to complete this plan. Working a lousy plan is worse than having no plan at all. Please answer the questions as honestly and as succinctly as possible.

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Question #1: How much money do you want to make next year?

\$ _____

Question #2: How much product (in sales dollars) do you need to sell to hit your desired income level?

\$ _____ Annually \$ _____ Quarterly

\$ _____ Monthly \$ _____ Weekly

Goals are those targets or objectives we strive to achieve. They give us a sense of direction, a sense of purpose, a path. They guide our intentions, and they help us to stay moving forward because there's an end in sight. Without goals, direction, and intention, a person can wander mindlessly from sales call to sales call going through the motions, but not achieving their objectives. It feels like you are working hard, in fact you might be working harder than you need to. When you are focused, intentional, and purposeful, you don't waste energy and time on tasks that don't help you to achieve your goals.

Bottom line: YOU ARE MORE EFFECTIVE.

Your goals must be meaningful to you. When they're not, it is rarely ever achieved. It's your choice. There are two types of goals, primary and stretch. You need to schedule and complete both types of goals on a weekly basis.

The primary goals are the things you need to do on a consistent basis to achieve your target. They are typically measured on a weekly basis. The stretch goals are two tasks that stretch you beyond your comfort zone. Stretch goals can change on a monthly basis dependent on the direction you feel you need to take. These stretch goals allow flexibility to adjust for variables such as your level of experience, length of time in the territory, volatility in market conditions, etc.

Your weekly goals are a combination of your primary and stretch goal broken down into smaller chunks so you can track your progress. Here are some examples of the different types of goals related to the Customer and Territory Development section:

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Primary Goals:

1. Get appointments with eight new accounts per month (2 new accounts per week)
2. Make 100 sales calls per month (25 calls per week)

Stretch Goals: (i.e. based on expanding into a new market with a new product line):

1. Make 25 prospecting phone calls into tech market with the new XYZ product line per month.
2. Make four product presentations to tech market per week.

Now that you understand the difference between primary and stretch goals you can start developing the plan to hit your objectives.

Question #3: What actions do you need to take in each of the four core areas to achieve your sales goals and how often (weekly, monthly etc) do they need to happen?

1. Customer and Territory Development:

I. Primary Goals

- a. _____
- b. _____
- c. _____

II. Stretch Goals

- a. _____
- b. _____

2. Product and Industry Knowledge

I. Primary Goals

- a. _____
- b. _____
- c. _____

II. Stretch Goals

- a. _____
- b. _____

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3. Selling Expertise

I. Primary Goals

- a. _____
- b. _____
- c. _____

II. Stretch Goals

- a. _____
- b. _____

4. Self-Development:

I. Primary Goals

- a. _____
- b. _____
- c. _____

II. Stretch Goals

- a. _____
- b. _____

Question #4: How could your Sales Manager support you in these four areas? (Be as specific as possible)

I. Customer and Territory Development

- a. _____
- b. _____
- c. _____

II. Product and Industry Knowledge

- a. _____
- b. _____
- c. _____

III. Selling Expertise

- a. _____
- b. _____
- c. _____

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IV. Self-Development

- a. _____
- b. _____
- c. _____

Question #5: How will you know if you're on track?

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

Question #6: How do you want your Sales Manager to work with you if you get off track?

- a. _____
- b. _____
- c. _____
- d. _____

Question #7: How will you reward yourself? How often?

Weekly: _____

Monthly: _____

Quarterly: _____

Annually: _____

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Congratulations, you have completed your personalized Performance ProView™ Plan! Here is a quick to do list to get this process in place.

1. Arrange a time with your Sales Manger to review your plan and discuss how they can support you to achieve your objectives.
2. Discuss how often you will meet with them to discuss your progress.
3. Don't forget to enter your weekly goals and objectives into your planner or palm pilot.
4. Every Friday review your week and ask yourself, "Did I achieve my objectives?" If you answer yes, don't forget to reward yourself. If not, ask yourself what needs to happen to ensure you accomplish your goals for next week.
5. Remember it was General George S. Patton who said "Plans must be simple and flexible . . . They should be made by the people who are going to execute them."

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ALIVE @ WORK™ L.L.C.
1-877-97-A-L-I-V-E
www.ALIVEATWORK.COM
Email: joe@ALIVEATWORK.COM