

Review of my Sales plan, Sale activity, Progress and Plans

My Company:

Date:

Sales person:

Sales Hours per week:

Reports I use :

Plan

Overall in 2017/18 my sales were : (Pls circle)

Better than Planned

What I expected

Worse than expected

Why?

What will I do more of ?

Why?

What will I do less of ?

Why ?

I regularly track my sales target against actual sales achieved?

I use / don't use weekly reports and analyse the information ?

Notes and comments on tracking

Targets

Will my target (circle) increase / reduce / stay the same in ?

Why?

Who did I love working with the most ?

Why ?

Who did I hate working with the most ?

Why ?

Did I spend enough time selling ?

Why ?

Should I spend more or less time selling ?

Did I get better at Selling ?

Why ?

Was my sales activity the right type ?

Why ?

What will I do more of to improve my sales and what did I learn?

What percentage capacity do I have ?

What percentage capacity do I want ?

What will I spend the income from my business on?

Why will it be worth the effort and commitment ?

Target Customer

Can I describe my perfect customer?

Why are they perfect ?

Turnover?

Small / medium / large

Geographical?

Staff?

Sector?

Budget?

Why they buy ?

Their expectations?

Who else they could use?

Other

Who else sells to them and what (supply chain)

What pain does my product or service solve ?

What is their reason for buying ?

Why do they like my approach ?

Who is my favourite customer?

Why ?

Who should I get more of ?

Who should I get rid of ?

Have I collected enough up to date testimonials and published them?

Do my testimonials align with my key marketing messages and what I do ?

What key lessons did I learn?

What will I do differently?

How long is my relationship with my customer?

When will they buy again ?

Do they refer me to others ?

Could I sell them something else in my services or product range?

Do I collect feedback ?

Observations.....

Pricing

Are my prices right for them?

Why ?

Am I going to put my prices up ?

Why ?

What is my average order value ?

Am I low priced / Medium Priced / Highly price ?

Why?

How many orders do I have to sell each month ?

Do I need bigger or smaller orders ?

What is their return on investment if they pay me £ X ?

How long does it take for them to see results?

What happens if they don't sort their issue?

Reputation...

Company

Personally

Risks...

Legal....

Financial.....

Staff impact.....

Future consequences

Other

Product

Why is my product / service wow ?

How could I improve it ?

Why ?

Are there ways to add value for minimal cost and time ?

Who else offers the same product or similar ?

Are they better or worse than me ?

Why ?

Could I reduce the cost of my product/service ?

How ?

Promotion

Was my promotion message and techniques successful in getting leads?

Why ?

What promotional activities will I use ?

What will I do differently ?

What will I spend on promotion?

Networking

Free sessions, Meetings / research / reports / travel to meetings

Social Media

Website

Leaflets / Brochures

Email campaigns

PR and advertising

Exhibitions

Referral fees

Courses- linked in , sales training etc.....

Other...

Total...per month £ Per year £ % of Sales Target.....

How much time will I spend on promotion per month ?

Did I Monitor and Compare different promotional approaches in time / money and return ?

Why ?

Which promotional activity am I the best at ?

Why ?

Which promotional activity am I the worst at?

Why ?

Packaging

Is it clear what I offer ?

What information on my offer do I have ?

How do I communicate / use it / present it ?

Are the benefits clearly stated?

What is my conversion of quotes to orders?

What reasons do people give if they don't order?

Do I reflect my brand in my sales approach?

How do my customers describe me ?

Why ?

How would new leads describe me ?

Why ?

Do I adapt my offer / proposal to my customer needs?

How?

Why?

What does my brand stand for?

How do I want to be described ?

What will my customers have achieved when I have delivered my product or service?

Sales Process

Scoring myself on the following areas on a scale of 1 – 10 and why I chose that score
where 1 = not good and 10 = amazing

You are not allowed to use 7

My sales process ?

Why?

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New ideas?

Why?

What I will do differently ?

Turning Ideas into Leads

Why?

What I will do differently ?

Turning Leads into Quotes

Why ?

What I will do differently

Turning Quotes into Orders

Why?

What I will do differently

Reporting

Why?

What I will do differently

Motivation

I feel more confident about my sales ability ?

Why ?

What I will do differently ?

I believe I can achieve my sales target ?

Why ?

What I will do differently ?

When is my motivation high ?

Why ?

What I will do differently

What will I be writing here about my sales and success in 12 months?