

Customising your Lead Tracking Sheet

Step 1: DOWNLOAD THE SPREADSHEET

The spreadsheet can be found in the Online Training Portal.

Step 2: CUSTOMISE FOR YOUR BUSINESS

1. Click on the 'Set Up' tab
2. In cell C2 enter the price of your Core Product
3. Identify our time period and add 70:10:2 into the appropriate column. For people who are full-time within their business, set a monthly target. If you wish to change this, copy the numbers in the Monthly column to the time period you want.

NB. Your Income goal is automatically calculated from your Core Product Price (C2) and your target sales volume for the month (G8).

You can change the 70 to 50 if you feel it more appropriate. As time goes by, you'll identify how many leads are required to result in 10 appointments. For now we are testing 70 to build a habit of generating leads and to give you the best chance of achieving 10 appointments.

Congratulations! Your quarterly target has now been calculated (3 months per quarter).

Step 3: LEAD SOURCE

4. Lead Source - Estimate how many leads you will generate from each source. The total needs to match or be greater than the total number of leads required in G10 (70 leads per week x 3 months). This is just a number for now. You will perfect this as you go.

Step 4: STARTING DATA

6. Refer to LinkedIn to find your starting numbers so you can measure your reach. See additional instructions below.
7. Enter the total number of leads of your database (relevant)
8. Note today's date so you know when your tracking period began.



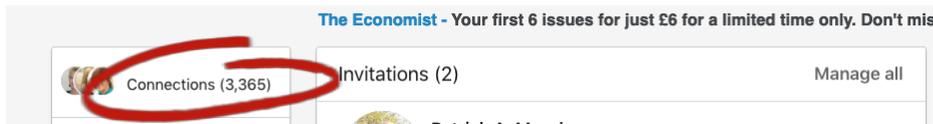
Step 5: SETTING UP YOUR LEADS SHEET

9. Navigate to sheet 'Source'

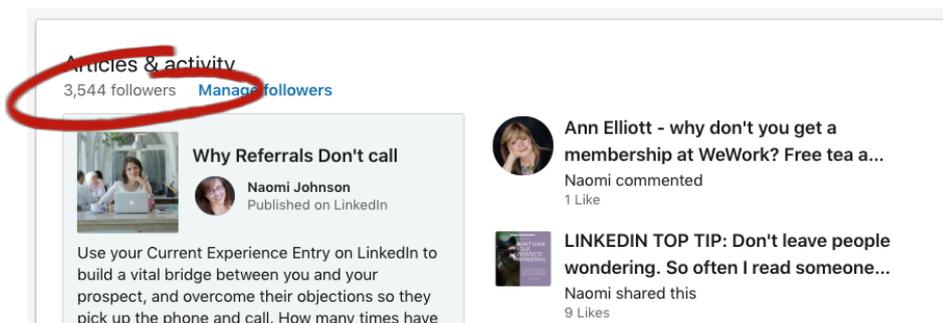
10. Create your own options for Status, Next Intention and Rating. This will customise the dropdown options on the sheet 'Leads'.

Finding your LinkedIn Numbers

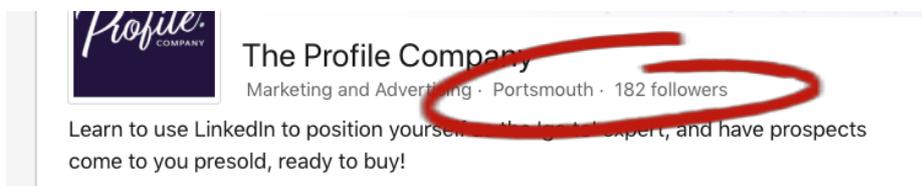
Connections: Click on 'My Network'. You will see your total number on the left.



Profile Followers: Navigate to your profile, beneath your Summary, you should see 'Articles & Activity'. Your followers are below.



Company Page Followers: Navigate to your company page (Click on the 'Me' icon and select your company page from the drop down menu)



Database: If you have Mailchimp or equivalent insert your total database leads, or current total for lists appropriate to this period of marketing and engagement.



Maintaining your Tracker

Top tips:

MONDAY - THURSDAY

- Begin each week with your Lead Tracker open on your computer
- Add new leads as they come in (you'll recognise a lead to add manually because you'll be excited)
- Add interesting LinkedIn connections as they come in
- Save daily

FRIDAY

- Download new leads from your mailing database that look interesting
- Check through your LinkedIn inbox for interesting leads that may have gotten missed (and check your email)
- Draw a line under the last entry to denote the end of the week
- Count up new entries from last week and add to 'Leads'
- Update the 'status' to denote where the lead is up to
- Check your online booking tool for new appointments booked and add to spreadsheet
- Check your diary for appointments that you did have (suggest using a different colour in your diary to denote sales appointments)
- Identify how many appointments led to you pitching your solution/packages and add the number to 'Presentation'
- Add up how much new business was confirmed
 - Selling core packages
 - Selling other items/packages
- Visit www.linkedin.com/sales/ssi to find out your Social Selling Index score
- Review your 'Activity' on your LinkedIn Profile and add up how much of each activity you did (Optional)

On a weekly basis you will only ever edit 'Leads' and 'Targets'. At the end of three months, it is recommended to create a new sheet by downloading the original. You can collate quarterly results at the end of the year.

BACKUP OPTION: Save a new version of your document every Friday. By adding the date to the start using the following format, files will self-organise in date order: 190218 (Year, Month, Day).



