

PURPOSE: Document your 5-Step Closed-Loop Goals with *S.M.A.R.T* criteria to map out your long term and short term goals, with plan to achieve your ultimate sales goals.

- S**pecific – Identify exactly what you want to achieve.
- M**easurable – Set out goals in such a way that you can measure your progress.
- A**chievable – Set smaller, more achievable goals and update them frequently.
- R**elevant – Goals should be relevant and consistent with the other objectives in your life.
- T**ime-bound – Set a specific time frame for completing each of your goals.

TYPE OF GOAL & TIME FRAME

1. Long Term Sales Goal: 3 to 5-year goal

2. Short Term Sales Goal: 1 year goal

3. Weekly Plan: # of sales calls per year = $[A \times 5] \times B \times C$

A=Daily Activity (number of client interactions)
 B=Overall Average Success Rate (avg. number of orders or commitments/avg. number of visits)
 C=Overall Average Value (avg. size of order or gross margin or volume)

4. Evaluate Your Activity: Evaluate your actions after each call

5. Reset Objectives and upgrade the plan: The more activity or greater success rate, the greater the sales volume