

CEO SALES EXPECTATIONS WORKSHEET

By Mike Carroll

Presented by Intelligent Conversations



1) History – 2012 Review

Gross Revenue:

Profit Margin:

Number of New Customers Acquired:

Number of Existing Customers Lost:

Top Five Customers in terms of Revenue:

Top Five Customers in terms of Profit:

2) Sales Metrics – 2011 Review

Qualified Appointments per Sales Person (weekly or monthly):

Qualified Proposals per Sales Person (weekly or monthly):

Total Business Proposed per Sales Person in 2010:

Total Business Won per Sales Person in 2010:

3) Sales Targets – 2013

Top Five New Companies to Target per Sales Person:

Top Five “Dormant” Companies per Sales Person (dormant defined as a former customer who has not done business with your firm in the past 12 months but has within the past 24 months):

Top Five Current Companies to Protect/Expand per Sales Person:

Minimum Activity Requirements per Sales Person (daily or weekly)

Number of Prospecting Calls (new or dormant targets):

Number of New Appointments:

Number of Customer Relationship Calls:

Number of Referrals/Introductions:

4) Revenue Targets – 2013

Gross Revenue Goal:

Gross Profit Goal:

Number of New Clients Acquired:

Renewal/Retention Rate Goal:

If you would like our assistance in completing this exercise or would like to go through this in a more thorough fashion tailored for your company, please call Mike Carroll at 414.727.9813.