INTELLIGENT CONVERSATIONS
Where Sales Results Begin

Sales Focus Worksheet

1) History – Where Have You Been Successful? (new sales people, ask a top producer on your team)

Top Five Customers in terms of revenue over the past 12 months:

1.
2.
3.
4.
5.

From the perspective of these top customers, what problems did you help them solve and what results have they achieved by using your product or service. Be specific and concrete.

2) Sales Focus – How can you find accounts and opportunities similar to what you wrote above?

1. Type of business (annual revenue, number of employees, industry, geography, etc.)

2. Title or role – reviewing your top successes, who do you work with? What is their title? What role do they play in their organization? What are their functional responsibilities? Were they the decision maker in choosing you and your firm?

3) Sales Targets – Time to be specific and narrow your focus on your "Top 20" prospect opportunities.

- Create a list of your "Top 20" accounts to target (use tools such as Jigsaw.com, LinkedIn.com, ZapData.com, chamber of commerce lists, industry associations, etc.)
- Begin calling the contacts on your "Top 20" list to engage them in a conversation. Use stories of the success you have had and results you have produced in similar situations. Ask questions to find similar challenges or problems.
- As you conduct these conversations, place each opportunity into one of three buckets:
  1. Good fit with a near-term opportunity (proceed through your sales process)
  2. Good fit, no near-term opportunity (place in your nurture file)
  3. Disqualified, the prospect is not a good fit for your company (delete from your list)
- Replace each contact as they are placed in one of the three buckets so you always have a "Top 20" list of active prospects. Focus on this list only.

If you would like our assistance in completing this exercise or would like to go through this in more detail and tailored for your company, please contact Mike Carroll at 414.727.9813 or mike@intelligentconversations.com

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