

Strategic MAP report
Monthly Action Plan

Sales Representative _____
Month _____ Sales Strategies

Total prior year	Current year sales goal	Scheduled & projected to date*	GAP needed to achieve goal	GAP Needed/wk
\$ _____	\$ _____ -	\$ _____	= \$ _____	\$ _____
Estimated Performance:				
Week 1	Week 2	Week 3	Week 4	Week 5
\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Actual Achieved:				
Week 1	Week 2	Week 3	Week 4	Week 5
\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

*This number includes ads already scheduled, as well as estimated business

Prior Year # Active Accounts # _____
Current Year Goal: # _____

Actual / End of Month	
Total \$ _____	+/- Goal _____%
Active # _____	+/- Goal _____%

General Prospecting Summary

I will prospect __ hours per week.

I will prospect at designated days and times each week.
Blocked out with lines on the chart to the right

I will prepare prospecting materials (research, letters, Co-op, emails, etc) at designated times. **Shaded** on the Chart to the right.

I will make a sales contact to each business in my Area of responsibility (even if they are cool prospects) At least once every _____

I will prospect each week until I secure _____ Appointments. (Specific contact goals MAP page 3

I will track my prospecting activities using _____

I will determine which prospects are hot, warm and Cool and apply a strategic prospecting strategy to each Category.

	Monday	Tuesday	Wednesday	Thursday	Friday
8-8:30					
8:30 – 9:00					
9:00 -9:30					
9:30 – 10:00					
10:00 – 10:30					
10:30 – 11:00					
11:30 – 12:00					
12:30 – 1:00					
1:00 – 1:30					
1:30 – 2:00					
2:00 – 2:30					
2:30 – 3:00					
3:00 – 3:30					
3:30 – 4:00					
4:00 – 4:30					
4:30 – 5:00					
5:00 – 5:30					

Top 10 Accounts	Prior year Monthly	estimated Monthly
1. _____	\$ _____	\$ _____
2. _____	\$ _____	\$ _____
3. _____	\$ _____	\$ _____
4. _____	\$ _____	\$ _____
5. _____	\$ _____	\$ _____
6. _____	\$ _____	\$ _____
7. _____	\$ _____	\$ _____
8. _____	\$ _____	\$ _____
9. _____	\$ _____	\$ _____
10. _____	\$ _____	\$ _____
Total		\$ _____ \$ _____

Top 10 Digital Accounts	Prior year Monthly	estimated Monthly
1. _____	\$ _____	\$ _____
2. _____	\$ _____	\$ _____
3. _____	\$ _____	\$ _____
4. _____	\$ _____	\$ _____
5. _____	\$ _____	\$ _____
6. _____	\$ _____	\$ _____
7. _____	\$ _____	\$ _____
8. _____	\$ _____	\$ _____
9. _____	\$ _____	\$ _____
10. _____	\$ _____	\$ _____
Total		\$ _____ \$ _____

Combined Total	\$ _____ \$ _____
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Top 10 Prospects	Estimated Monthly
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
7. _____	\$ _____
8. _____	\$ _____
9. _____	\$ _____
10. _____	\$ _____
\$ _____	
Combined Prospect Total \$ _____	

Top 10 Digital Prospects	Estimated Monthly
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
7. _____	\$ _____
8. _____	\$ _____
9. _____	\$ _____
10. _____	\$ _____
\$ _____	

Sales Contact Goals ~ NEW BUSINESS ONLY

1. Monthly GAP Goal (Revenue Goal <i>minus</i> Projected Reoccurring Revenue)	\$ _____
2. Divided by Average Monthly Revenue Per Client:	\$ _____
3. = Number New Clients Needed to Achieve Monthly Goal:	_____

Estimate # of prospecting contacts:

4. Number of New business contacts

#/wk _____

Estimate # that will turn into needs analysis appointments:

5. Number of clients needs analysis meetings (CNA)

#/wk _____ Needs Analysis Ratio _____%

Estimate # that will turn into presentations:

6. Number of presentations

#/wk _____ Presentation Ratio _____%

Estimate # that will turn into new clients:

7. Number of new clients

#/wk _____ Presentation close Ratio _____%

Effective Close Ratio _____%

Will you meet your goal?

If you will NOT meet your goal, return to #4, increase sales contacts and repeat the process.

New Business Contact Goals	Monthly	Weekly	Daily
In-person contacts	_____	_____	_____
Telephone contacts	_____	_____	_____
Voice Mail Messages	_____	_____	_____
Emails	_____	_____	_____
Handwritten Notes/cards	_____	_____	_____
Mailed letters/info	_____	_____	_____
Other _____	_____	_____	_____

	#Prospecting contacts	# CNA meetings	# presentations	# New Clients
Week 1				
Week 2				
Week 3				
Week 4				
Week 5				
Total				