

The Ultimate Sales and Profit-Boosting Action Plan: Worksheet #1

Your Name

Date

Step # 1 Identify Your Business Values and Vision:

Make your success vision **BIG** this isn't the place to hold back. Let it reflect the values that are important to **YOU!** Make it measurable and specific.

Example: Success means providing a valuable and fun service to my clients that allows me to make 100,000 a year or more without working evenings or weekends. It means always having time for my family and friends and taking four weeks vacation a year.

Now it's your turn, what does success mean to you? **Make it measurable and specific.** Post and date your success vision in a place where you can see every day.

Identify what is working: What three things have worked in the past? What do you need to do more?

Example: Asking existing clients if they know of anyone that can use my service.

- 1.
- 2.
- 3.

Identify what isn't working: What three things do you need to stop doing?

Example: Spending time on projects before I pre-qualify clients. Make sure there's a want, need and budget.

- 1.
- 2.
- 3.

Identify three places where you can get help and support: Where are three places that you can help when you're stuck?

Example: The email support forum that is part of this program.

- 1.
- 2.
- 3.

Write Your Own Action Plan

Your Name

Date

What is your current level of sales?

Monthly

Yearly

What is your current gross profit margin?

Monthly

Yearly

What is your desired level of sales?

Monthly

Yearly

What is your desired gross profit margin?

How To Achieve Your Sales Goals

- 1. Get out a blank piece of paper and draw a line in the middle.**
- 2. On one side of the paper write the word “Goal” on the other side put the word “Action Steps.”**
- 3. Choose 3-5 Action Steps that you will do every week to achieve your goals.**
- 4. Put this sheet in a place where you can see it every day.**
- 5. Take action every day.**
- 6. Make yourself accountable! Use a calendar, buddy or a coach.**
- 7. Use the suggestions in Work Sheet #2 as a model for your action plan.**

