

MATH OF SUCCESS WORKSHEET

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| A | What is your annual sales goal: | |
| B | Break it down into Monthly Sales Goal: <i>(Divide A by 12)</i> | |
| C | Determine your average sale size and enter it here: | |
| D | Determine how many closed sales needed per month: <i>(Divide B by C)</i> | |
| E | Determine your closing ratio and enter here: <i>(Example: I close 3 deals for every 10 initial meetings. Enter as a decimal value. Example: $3/10 = .3 = 30\%$ closing ratio.)</i> | |
| F | Work backward to determine number of first meetings necessary to produce an adequate number of opportunities per month: <i>(Divide D by E. Calculation is rounded.)</i> | |
| G | Calculate weekly number of first meetings required: <i>(Divide F by 4.25. Calculation is rounded.)</i> | |

Weekly (or Daily) Activities to Produce Enough First Meetings:

(Must be specific, measurable, etc. Examples: Ask 5 clients for referrals; Spend 30 minutes on LinkedIn to get 10 connections; Conduct 2 meetings with referral sources, etc.)

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