SALES CONVERSATIONS AND CONVERSIONS

MONTH _____

YEAR _____

ANNUAL REVENUE GOAL _____

THIS MONTH'S REVENUE GOAL _____

LAST MONTH'S REVENUE GOAL _____

LAST MONTH'S REVENUE _____

SALES CONVERSATIONS NEEDED _____
(Considering Average Conversion Rate and Goal)

OUTREACH NEEDED _____
(To Achieve Adequate Number of
Qualified Prospects & Sales Conversations)

LEADS ENGAGED (Top of funnel—Social Likes/Comments, Emails, Video Views, Etc.) _____

PROSPECTS TOUCHED _____
(Phone, Personal Emails, In-Person)

QUALIFIED PROSPECTS _____
(People you invited to a sales conversation)

NO. OF SALES CONVERSATIONS (Conversations that ended in your making an offer) _____

LEAD TO SALES CONVERSATION CONVERSION _____
(# of Sales Conversations divided by # of Qualified Prospects)

CLIENTS CONVERTED _____
(Number of New Clients Enrolled)

SALES CONVERSION RATIO _____ (Clients Converted divided by Conversations)

TOTAL NEW SALES CLOSED (Total Amount of Sales Billed/Invoiced) _____

TOTAL NEW SALES CASH RECEIVED (Cash in Hand from Conversation Closes) _____

TOTAL CLIENTS CONVERTED (Number of New Clients Enrolled + Client Renewals) _____

CASH IN THE DOOR AND DEPOSITED THIS MONTH _____

2 DEDICATED AREAS OF FOCUS TO MAKE IT HAPPEN THIS MONTH:

TO ACHIEVE MY GOALS THIS MONTH, I AM FOCUSING ON THE FOLLOWING KEY AREAS:

1. _____ **2.** _____

SALES TRACKER

CONTACT	CALL	EMAIL	OTHER	ENGAGEMENT	CONVERSATION	OFFER	CLOSED	DATE CLOSED