



# Sales Management Checklist





# Managing By The Numbers

**Pearson's Law:** *“When performance is measured, performance improves. When performance is measured and reported back, the rate of improvement accelerates.”*

## 3 Numbers To Watch And One To Manage By:

1. Sales Activities (Calls, Dials, Messages)
2. Sales Objectives (Appointments Made)
3. Business Results (Sales, Revenue Produced)

### Sales Objectives And Activities For Telemarketing:

- Dials (100 per day)
- Contacts (10%-20% based on the quality of the list)
- Appointments SET (10% based on the quality of the list and offer)
- Appointments SAT (Should be 80% or higher)

### For Inside Sales Pros:

- “Fully Integrated” Client (Ascension Ladder)
- Increase In Client Spend/Profit
- Proposals Generated/Closed
- Dollar Amount Of Each Proposal

### For Outside Sales Pros:

- “Meaningful Conversations” and/or New Appointments
- Proposals Generated/Closed
- Average Dollar Amount/Profit Per Contract

**Key Point: You Get What You Expect AND Inspect!**



## Daily Activity Tracking For Setting Appointments:

Salesperson:		Date:	
Pitch/Offer:			
List Called:			

### Number Of First-Time Dials

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37  
 38 39 **40** 41 42 43 44 **45** 46 47 48 49 **50** 51 52 53 54  
**55** 56 57 58 59 **60** 61 62 63 64 **65** 66 67 68 69 **70** 71  
 72 73 74 **75** 76 77 78 79 **80** 81 82 83 84 **85** 86 87 88  
 89 **90** 91 92 93 94 **95** 96 97 98 99 100

### Number Of Voice Mails Left

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37  
 38 39 **40** 41 42 43 44 **45** 46 47 48 49 **50** 51 52 53 54  
**55** 56 57 58 59 **60** 61 62 63

### Number Of Pitches Delivered

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37  
 38 39 **40** 41 42 43 44 **45** 46 47 48 49 **50** 51 52 53 54  
**55** 56 57 58 59 **60** 61 62 63

### Number Of Appointments Set

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37  
 38 39

### Number Of Follow-Up Calls Made On Maybes

1 2 3 4 **5** 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37  
 38 39

Conversion From Dials To Pitches: \_\_\_\_\_

Conversion From Pitches To Appointments: \_\_\_\_\_

Total Appointments Set: \_\_\_\_\_

Notes:

7:00 am	
7:30 am	
8:00 am	
8:30 am	
9:00 am	
9:30 am	
10:00 am	
10:30 am	
11:00 am	
11:30 am	
Noon	
12:30 pm	
1:00 pm	
1:30 pm	
2:00 pm	
2:30 pm	
3:00 pm	
3:30 pm	
4:00 pm	
4:30 pm	
5:00 pm	
5:30 pm	
6:00pm	



# Notes:

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## Daily Sales Activity Tracking Form: Sponsorships

Product/Pitch: \_\_\_\_\_

The List You Were Calling On: \_\_\_\_\_

### Total Number of Dials

1 2 3 4 5 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37  
 38 39 **40** 41 42 43 44 **45** 46 47 48 49 **50** 51 52 53 54  
**55** 56 57 58 59 **60** 61 62 63 64 **65** 66 67 68 69 **70** 71  
 72 73 74 **75** 76 77 78 79 **80** 81 82 83 84 **85** 86 87 88  
 89 **90** 91 92 93 94 **95** 96 97 98 99 **100**

Total: \_\_\_\_\_

### Number of Voice Mails Left

1 2 3 4 5 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37  
 38 39 **40** 41 42 43 44 **45** 46 47 48 49 **50** 51 52 53 54  
**55** 56 57 58 59 **60** 61 62 63 64 **65** 66 67 68 69 **70** 71  
 72 73 74 **75** 76 77 78 79 **80** 81 82 83 84 **85** 86 87 88  
 89 **90** 91 92 93 94 **95** 96 97 98 99 **100**

Total: \_\_\_\_\_

### Number of LinkedIn Prospecting Messages

1 2 3 4 5 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37  
 38 39 **40** 41 42 43 44 **45** 46 47 48 49 **50** 51 52 53 54  
**55** 56 57 58 59 **60** 61 62 63 64 **65** 66 67 68 69 **70** 71  
 72 73 74 **75** 76 77 78 79 **80** 81 82 83 84 **85** 86 87 88  
 89 **90** 91 92 93 94 **95** 96 97 98 99 **100**

Total: \_\_\_\_\_

### Number of NEW Meaningful Conversations

1 2 3 4 5 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**  
 21 22 23 24 **25** 26 27 28 29 **30** 31 32 33 34 **35** 36 37

Total: \_\_\_\_\_

### Number of Contracts Sold

1 2 3 4 5 6 7 8 9 **10** 11 12 13 14 **15** 16 17 18 19 **20**

Total: \_\_\_\_\_

### Weekly Summary For This Project:

Total Number Of Prospects Reached: \_\_\_\_\_

Percentage Of NEW Meaningful Conversations: \_\_\_\_\_

Percentage Of Contracts Sold: \_\_\_\_\_

7:00 am	
7:30 am	
8:00 am	
8:30 am	
9:00 am	
9:30 am	
10:00 am	
10:30 am	
11:00 am	
11:30 am	
Noon	
12:30 pm	
1:00 pm	
1:30 pm	
2:00 pm	
2:30 pm	
3:00 pm	
3:30 pm	
4:00 pm	
4:30 pm	
5:00 pm	
5:30 pm	
6:00 pm	
7:00 pm	

**IMPORTANT!!!** Make sure all the wrong numbers, bad numbers and other names that need to be followed up on are noted so we GO BACK AND CORRECT THEIR CONTACT INFORMATION!!!!



# Notes:

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