

Personal Sales Planner

90-Day Planner for Solopreneurs to Get Predictable Growth in Business

MONTHS

YEAR

Index

FOREWORD

The Benefits of a Sales Plan
How to Fill Your Sales Planner

SALES SUCCESS

Setting-Up for Sales Success
Pledge
Sales Affirmations
Goal Setting

SALES PROCESS

Arsenal Checklist
Sales Funnels
Personal Branding
Networking Plan
Personal Development

SALES ACTIVITIES

Connecting with Existing Clients
Nurturing Active Prospects
New Leads

SALES ASSESSMENT

Performance Review
Reflections
No Matter What, I'm Proud of Myself

AFTERWORD

About the Creator of This Personal Sales Planner

FOREWORD

The Benefits of a Sales Plan

As a solopreneur, you are juggling too many tasks at hand — from operations to client servicing to product development to marketing and more. It surely keeps you on your toes all the while. Even if you have a team to manage and execute things for you, the primary responsibility of bringing in the buck lies on you.

Only you are responsible for getting in clients, growing the revenues, and running of a smooth sales engine. If that's the case, this Personal Sales Planner is perfect for you to take control of your sales activities, and bring in predictable growth to your business.

A sales plan does deliver side-benefits such as promoting discipline and diligence, but it's really about making sure your sales don't dry up over time. Which means, it's not optional.

The reality is that most of us aren't planners. We talk a good game, but nothing happens until we're accountable.

Without a written plan, it's just talk.

So the first benefit of a sales plan is that it helps you execute all your best ideas because they are right in front of you. Research shows that individuals with written goals achieve almost 50% of their goals than those with no written goals. A goals program in writing can help you identify achievements that will ultimately be more meaningful to you, in order to clarify and crystallize your thinking. And this planner not only serves as a record for your goals, but also makes it a "SMART" plan of action to achieve and review your goals, and also to measure your performance.

It lists down the activities that will help you attain the sales goals that you want to achieve. It clearly helps you track the business generated by working in a quarterly fashion, because long-term goals might not motivate you enough, but a short-term action plan does give you the momentum and energy to follow through your dreams.

FOREWORD

How to Fill Your Sales Planner

When you sit down to fill in your sales planner, keep the following tips in mind.

Base it on what you feel intuitively, and then back it up with in-depth and updated research and analysis of your business and personal selling style. You need to develop a deep understanding of the trends related to your niche, industry, and ideal customers. Remember, markets and customers are in a constant state of flux. There's nothing worse than willfully chasing prospects who aren't a good fit anymore, while ignoring entire market segments that show a rising demand for your solution.

Use your previous performance statistics and data to help you set realistic and attainable targets for the current period. Your goals should encourage you and not stress you out. For example, what were your previous revenue targets? Did you hit them? Why or why not? This information can help you set achievable goals for your current sales plan.

Look forward to the results that you want to achieve so you can lead your drive to fully implement the sales processes that you have listed in your plan.

Be very clear about who you are serving. Make sure that you are aware of your target market, and you are knowledgeable about the client profiles of people whom you want to transact business with.

Use strategies that can help you identify sales leads, send across your messaging appropriately, and close deals that will translate to the growth of your sales productivity. You can find more resources on the same in the blog section of www.roshnibaronia.com, or listen to the podcast *Ace the Sales*.

Sales Success

Setting-Up for Sales Success

How does my body react to the idea of selling?

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How does my brain respond to the idea of selling?

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Is this a response that works in my favor or does it need to change?

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What precisely needs to change?

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Making friends with selling helps me achieve my business goals, personal well-being, and feeling of accomplishment. My business purpose gets fulfilled. So am I willing to bring the change?

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What specific steps I need to take to bring this change?

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Which areas I need to improve upon?

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Pledge

This planner will help me progress towards my revenue goals in a structured and systemized manner. It helps me bring discipline and consistency in my sales efforts.

I can have predictable growth in my business by following this 30-60-90-day sales activities. Thus, I am ready to commit my time and priority to follow this plan.

I pledge that I will take actions as per this planner to achieve my daily, weekly, and monthly targets so that — I can see myself sell more, earn more, and live more.

Sales Affirmations

The power of affirmations: Positive self-talk can massively impact the performance and outcome of your sales efforts. It will help you overcome the fear, anxiety, and procrastination. Affirmations bring in confidence, willingness, and motivation. These positive thoughts then trigger new actions that will lead to more successful results. Say these affirmations before making a sales call or getting into a sales conversation:

1. I have a product/service that everyone wants.
2. I am tuning in with my customer's needs and I know I can deliver value for them.
3. I am great at selling as it is the route to achieve my goals.
4. I am comfortable talking to my prospects as it is an opportunity to know and solve their problems.
5. My ability to listen and have empathy for others is only surpassed by my ability to truly understand the needs of others.
6. I realize that courage and momentum are created by taking action, and I love to take action.
7. I am an effective and powerful presenter and sales person.
8. I am a winner! I look like a winner! I sell like a winner! I succeed like a winner!
9. I believe in my selling abilities.
10. My most important product is me! I believe in that product and I am always ready to sell it.

Create your own:

1.
2.
3.
4.
5.

Goal Setting

Last FY 20.....-.....:

Annual Revenue:

Last Quarter Revenue:

Current FY 20.....-.....:

Revenue Target:

Current Quarter Target Revenue:

90-Day Planner

MONTH 1	MONTH 2	MONTH 3
30-DAY MILESTONES	60-DAY MILESTONES	90-DAY MILESTONES
MONTHLY GOALS	MONTHLY GOALS	MONTHLY GOALS

MONTH 1	MONTH 2	MONTH 3
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WEEK 1 TARGETS	WEEK 1 TARGETS	WEEK 1 TARGETS

WEEK 2 TARGETS	WEEK 2 TARGETS	WEEK 2 TARGETS

WEEK 3 TARGETS	WEEK 3 TARGETS	WEEK 3 TARGETS

WEEK 4 TARGETS	WEEK 4 TARGETS	WEEK 4 TARGETS

Sales Process

Arsenal Checklist

- Marketing collaterals
- Curated products
- Service packages
- Proposals/decks
- Payment plans
- Easy payment options
- Set of customizable options
- Client onboarding process
- Client servicing/delivery process
- Sales pitch — benefits, value, unique selling proposition
- Any human resource or team, addition/outsource support required

Add more based on your business:

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Any product/service/marketing material development to be done?

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What and why?

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Sales Funnels

Outreach and awareness activities to fill the sales pipeline with new leads. Examples of this are training videos for YouTube, social media engagement, webinars, etc.

1. Attract Stage:

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2. Engage Stage:

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3. Nurture Stage:

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4. Invite Stage:

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5. Enroll Stage:

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Personal Branding

Influence building to tell people who you are and what you do. Examples of this is guest posting, blogging, content creation, and speaking engagements.

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Networking Plan

Get more face time with your prospects/customers/peers both offline and online. Examples of this include attending networking events, community meetups, scheduling virtual coffee, who do you want to meet over coffee, reach out to industry influencer to build connections.

1.

2.

3.

4.

5.

6.

7.

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9.

10.

Personal Development

Educate yourself one hour each week doing activities that help you in selling. Examples of this include listening to podcast Ace the Sales, reading books, reading industry journals, gathering competitor information, understanding industry trends of your clients, etc.

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2.

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3.

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4.

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Sales Activities

Sales Assessment

Performance Review: 1

Monthly Review

REVIEW MONTH

PERSONAL BRANDING GOALS MET? (YES/NO)

MEETING GOALS MET? (YES/NO)

NUMBER OF DISCOVERY CALLS DONE?

NUMBER OF NETWORKING MEETINGS?

NUMBER OF SALES CALLS?

NUMBER OF SALES MEETINGS?

NUMBER OF SALES EMAILS SENT?

NUMBER OF PROPOSALS SUBMITTED?

NUMBER OF NEW LEADS ACQUIRED?

NUMBER OF WARM LEADS?

NUMBER OF HOT LEADS?

Performance Review: 2

Monthly Review

REVIEW MONTH

PERSONAL BRANDING GOALS MET? (YES/NO)

MEETING GOALS MET? (YES/NO)

NUMBER OF DISCOVERY CALLS DONE?

NUMBER OF NETWORKING MEETINGS?

NUMBER OF SALES CALLS?

NUMBER OF SALES MEETINGS?

NUMBER OF SALES EMAILS SENT?

NUMBER OF PROPOSALS SUBMITTED?

NUMBER OF NEW LEADS ACQUIRED?

NUMBER OF WARM LEADS?

NUMBER OF HOT LEADS?

Performance Review: 3

Monthly Review

REVIEW MONTH

PERSONAL BRANDING GOALS MET? (YES/NO)

MEETING GOALS MET? (YES/NO)

NUMBER OF DISCOVERY CALLS DONE?

NUMBER OF NETWORKING MEETINGS?

NUMBER OF SALES CALLS?

NUMBER OF SALES MEETINGS?

NUMBER OF SALES EMAILS SENT?

NUMBER OF PROPOSALS SUBMITTED?

NUMBER OF NEW LEADS ACQUIRED?

NUMBER OF WARM LEADS?

NUMBER OF HOT LEADS?

Reflections

How do I feel about my sales efforts?

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Is my performance up to my expectations?

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What worked?

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What did not work?

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What more can I do to improve my sales performance?

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Where did I feel anxiety/fear/limiting beliefs coming up?

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What will I do the next time they come up?

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No Matter What, I'm Proud of Myself

90-day plan success evaluation:

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Did I meet my quarterly revenue goals?

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How many new client relationships did I open up?

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My success mantra?

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AFTERWORD

The 90-day sales plan helps you focus on key activities you need to do for meeting your revenue goals. You can repeat this exercise for each quarter thus streamlining your entire annual growth plan.

For more information on how to use the planner visit www.roshnibaronia.com

About the Creator of This Personal Sales Planner

Roshni Baronia is a Go-Global Strategist working with women entrepreneurs to bring in more sales, scale, and sustainability in their business. Her boutique firm RB Consulting works with women-led startups and SMEs to provide sales advisory and growth consultation in areas of sales process optimization, strategic sales planning, and team development. Learning from her entrepreneurial journey of more than a decade, she also coaches and mentors solopreneurs to be the CEO of their businesses.



Roshni is a TEDx speaker, listed in 'Top 20 Most Promising Women Consultants for 2020' by Consultant Review magazine, and contributes for many publications and forums as writer and speaker. She is host to the podcast show *Ace the Sales*, which helps women bring their true and complete self to each and every conversation. Roshni is often invited as speaker to podcasts, virtual summits, conferences and events to share her thoughts on business growth, sales expertise, and women entrepreneurship.

She is a certified Strategic Sales Expert who has authored the e-book 'How to Revolutionize your Sales Mindset' and curated a personality test to know your 'Authentic Selling Style', which is exclusively for women entrepreneurs to identify their unique selling style that helps them amplify their strengths and work upon their weaknesses. Roshni believes that bringing your authentic self to any sales conversation is the key to sales success!