




Sales Goals 1 - Making Your Manager's Goals Personal (65 minutes)

Lesson Overview

<p>Description: This session is the first of several that explicitly address sales goals. Every employer will give their salesperson a goal, typically stated as a monthly goal. Since excellent sales people break down this role into smaller goals, this session gives them a chance to practice this. It also talks about how you track your progress to a goal. There is some math involved, so calculator use is encouraged.</p>			
<p>Participant Learning Objectives: <i>By the end of the session, learner will be able to:</i></p> <ul style="list-style-type: none"> • Use a company goal to create a daily, weekly and monthly goal for myself. • Monitor progress toward a daily, weekly and monthly goal. 			
<p>Key points to promote to learner:</p> <ul style="list-style-type: none"> • Your company will give you monthly goals. You are responsible for planning how to achieve them! • Strong salespeople create weekly and daily goals based on their company goals. • From those goals, actions steps and evaluations are built in to ensure success. 			
Behaviors	<ul style="list-style-type: none"> • Proactive Actions 	Mindsets	<ul style="list-style-type: none"> • Future orientation
Keywords	<ul style="list-style-type: none"> • Monthly goal • Weekly goal • Progress Monitoring 	Materials	<ul style="list-style-type: none"> • Calculators
Session Sequencing	<ul style="list-style-type: none"> • TBD 		
Performance Goals	<ul style="list-style-type: none"> • b. Create and execute strategic goal planning and evaluation to meet daily, weekly and monthly sales targets - not limited to those given by employers. 		
Session Assessment	<ul style="list-style-type: none"> • Practice - Breaking Down Daily & Weekly Sales Goals observe participant's process for understanding and application.. • Monitoring Progress - self reflective Q & A, understanding of learning objectives and elements of instructional plan. 		
Icons	 Activity	 Debrief	 Assessment

Pacing Guide

Time	Activity
5 minutes	Opening: Welcome & Task Planning <ul style="list-style-type: none">• Task Planning Activity - Maze• Debrief
10 minutes	Content: Breaking Down Bigger Goals Into Smaller Goals <ul style="list-style-type: none">• Objectives• Introduction: Dividing The Month Into Smaller Parts• Calculating Sales Weeks & Sales Days• Debrief
10 minutes	Practice: Breaking Down Bigger Goals Into Smaller Goals <ul style="list-style-type: none">• Calculating Sales wWeeks & Sales Days• Debrief
10 minutes	Content: Breaking Down Monthly Sales Goals <ul style="list-style-type: none">• Calculating Daily & Weekly Sales Goals
20 minutes	Practice: Breaking Down Monthly Sales Goals <ul style="list-style-type: none">• Calculating daily and weekly sales goals• Debrief
5 minutes	Content: Monitoring Progress of Goals <ul style="list-style-type: none">• Review S.M.A.R.T. goals for application• Optional Advanced S.M.A.R.T. goals application sample• Assessment: Reflection questions individually
5 minutes	Closing: <ul style="list-style-type: none">• Review of reflection questions with answers• Debrief

Preparation Guide

PREPARATION - Sales Goals 1 - Making Your Manager's Goals Personal

- Print participant copies located at the end of the session plan
- Review the presentation links in advance [HERE](#)
- **Materials Needed:**
 - Link to Google Sheets Digital Presentation [HERE](#)
 - Extra sharpened pencils for participants

OPENING - Welcome & Task Planning Activity (5 minutes)

Instructor note: The purpose of this section is to welcome participants and use a ‘hook’ activity to engage them in a simple goal oriented task that connects **Future Orientation**, and **Proactive Thinking** to this session’s objectives.

Opening: Distribute MAZE printout **FACED DOWN**, instructing participants to wait for instructions as everyone should begin and stop at the same time.

Task Planning Activity

- **Give Directions:**

- Instruct:** Set a timer for 1 minute. Instruct participants to complete the activity **INDEPENDENTLY** and place your pencil down when time is up. (When ready, begin activity for 1 minute)
- Ask:** *“What strategies were used?”*
- Discuss:** Starting from the end and working backwards strategy


○ **Debrief**

- **Review:** To achieve a goal, it is important to create a plan
- **Connect:** **Future Orientation** mindset and the skill of **Proactiveness** to the session objectives.
- **Inform:**
 - In a sales role, monthly goals are set and employees are expected to meet them.
 - Most companies provide incentives for high achievers.
- **Say Quotes (Straight from the boss):**
 - *“Weak sales people don’t plan, they just start counting up sale by sale, hoping that the sales add up to the monthly sales goal”.*
 - *“High performers break the month down week by week and day by day and calculate smaller goals.”*
 - *“Without goals, you will become a routine, move around, go nowhere sales person. These are people who approach customers saying “Oh, I was just passing by.”, and that’s all they do - pass by. A “courtesy call / just saying hi” sales person is NOT a high performer.”*


CONTENT – Breaking Down Bigger Goals Into Smaller Goals (10 minutes)

Instructor note: The purpose of this section is to learn how to divide a whole month into smaller parts, accounting for available sales days.

Introduction: Session Objectives

- **Objectives:** Explain and refer to 'Objective' slide 

Dividing The Month Into Smaller Parts

- **Discuss:** Calendar considerations when identifying the number of days in a month 
 - Possible Answers: should reflect 'Not All Months Are Created Equal' slide
- **Discuss:** Why It is important to know how many days are in each week, and how many weeks in the month
 - Possible Answers: to be able to create smaller goals throughout the month.

Breaking Down Bigger Goals Into Smaller Goals

- **Give Guided Instruction:**

Instruct:: Using Steps To Planning Sales Goals Reference Guide 

- Explain all steps briefly, but note that the first step to be taught and practiced is breaking down the calendar into months and days.

- Provide:** 2019 calendar  , Calendar Calculation Chart (July, 2019) 

Review:: color coding system;

- Red** indicates non sales days.
- Yellow** indicates '1' full sales day.
- Blue** indicates '.5' sales day. Each is equal to a half of a day.
- Pink** indicates the total sales days for each week.
- Green** indicates the total sales days for the entire month.

Demonstrate: how the chart is calculated as '1' for full sales day and '.5. For half days.

o **Debrief**



- The purpose of the exercise is to demonstrate how weeks and days must be divided correctly before **calculating sales goals**.

PRACTICE - Breaking Down Bigger Goals Into Smaller Goals (10 minutes)

Instructor note: The purpose of this section is to practice how to divide a whole month into smaller parts, accounting for available sales days.

Calculating Sales Weeks & Sales Days

- **Give Directions:**

- Practice** skill application:
 - Provide;**
 - Calendar Calculation Chart (Blank) color coded  or
 - Calendar Calculation Chart non color coded 
- Observe:** Individual accuracy and understanding
 - Reteach:** individually as needed
- Explain:** Using the chart just completed that participants will;
 - Calculate** the number of weeks and days for any other month in the 2019 calendar and
 - Compare** with another participant to check and defend accuracy

- **Check For Understanding:**

- **Ask:** *“Why is it important to know the number of sales weeks and sales days when planning smaller monthly sales goals?”*
 - Answer: “To be able to create **S.M.A.R.T.** , or smaller goals throughout the month to successfully achieve the monthly goal”



CONTENT – Breaking Down Monthly Sales Goals (10 minutes)

Instructors Note: The purpose of this section is to learn and apply basic math calculations to establish a foundation for setting weekly and daily goals.

- ❑ **Explain:** Employers will usually give sales people a monthly sales goal.
 - ❑ **Ask:** “What is a “High Achiever?”
 - ❑ Possible Answers: will vary, but should reflect: one who uses the future oriented mindset and is proactive to achieve or exceed goals
- ❑ **Review:**
 - ❑ Most companies provide incentives for high achievers.
 - ❑ Weak sales people don’t plan, they just start counting up sale by sale, hoping that the sales add up to the monthly sales goal.
 - ❑ High performers break the month down week by week and day by day and calculate smaller goals.
- ❑ **Say Quote (Straight from the boss):** “Without goals, you will become a routine, move around, go nowhere salesperson. These are people who approach customers saying “Oh, I was just passing by.”, and that’s all they do - pass by. A “courtesy call / just saying hi” sales person is NOT a high performer.
- ❑ **Provide Calculators**

👉 Breaking Down Monthly Sales Goals

- **Give Guided Instruction:**

- ❑ **Describe Instructor Led Next Step:**
 - ❑ Using the July, 2019 completed chart and the formula in Steps For Calculating Daily & Monthly Sales Goal 
 - ❑ Calculate (using calculators) the weekly and daily sales goals working backward from the monthly sales goal of \$100,000
 - ❑ Check: Recalculate forward from daily to weekly to monthly to ensure the final total is \$100,000.
- ❑ **Explain:** How to calculate using the following formula; 
 - ❑ Participants should follow along with printout

PRACTICE – Breaking Down Daily & Weekly Sales Goals (20 minutes)

Instructors note: This purpose of this section is for independent practice overseen by instructor observation and added support to ensure mastery. Peer support should be encouraged once mastery is established with the supporting peers.

👉 **Breaking Down Daily & Weekly Sales Goals**

✓ **Breaking Down Daily & Weekly Sales Goals**

- **Give Directions:**

- Provide:**

- Sample Monthly Sales Goals Chart (complete) 

- Sample Monthly Sales Goals Chart (blank) 

- Practice:**

- Participants will practice and demonstrate mastery by;

- selecting a different month and

- deciding on a new monthly sales goal and

- constructing a monthly sales goal plan independently.

- Observe For Mastery:**

- Assist as needed with math calculations

- Encourage peer support from those who have demonstrated mastery to others struggling with the concepts.

- Encourage** as many more practice opportunities as time permits by selecting a different month and monthly sales goals



👉 Debrief

- Provide a summary review of this section and explain that creating the plan is only effective if the progress of the goals is monitored.

CONTENT – Monitoring Progress of Goals (5 minutes)

Instructor note: This purpose of this section is to emphasize the importance of keeping good records to closely **monitor progress** and make necessary adjustments to the daily, weekly, and monthly goals. This section both reinforces the skills learned in this session, AND connects the **Future Oriented mindset** and **Proactiveness behavioral skills**..

Content:

- **Review:** S.M.A.R.T. goal setting  as a part of the planning process 
- **Brainstorm:** “How could questions #2 and #3 be reframed as part of the ongoing monitoring process
 - Answers should reflect
 - #2 What problem(s) am I facing, have occurred, etc.?
 - #3 How will I overcome AND adjust for these problems?

Optional:

- Advanced Planning Activity Printout included with printouts after ‘end of session’.
 - This should be used at the instructor's discretion if;
 - There is additional time
 - The participants are moving quickly and easily through the planned materials, of
 - For students who are ready for a challenge or want additional resources


✓ Assessment Objectives

- Student will reflect and answer the questions independently. 

Review

CLOSING (5 minutes)

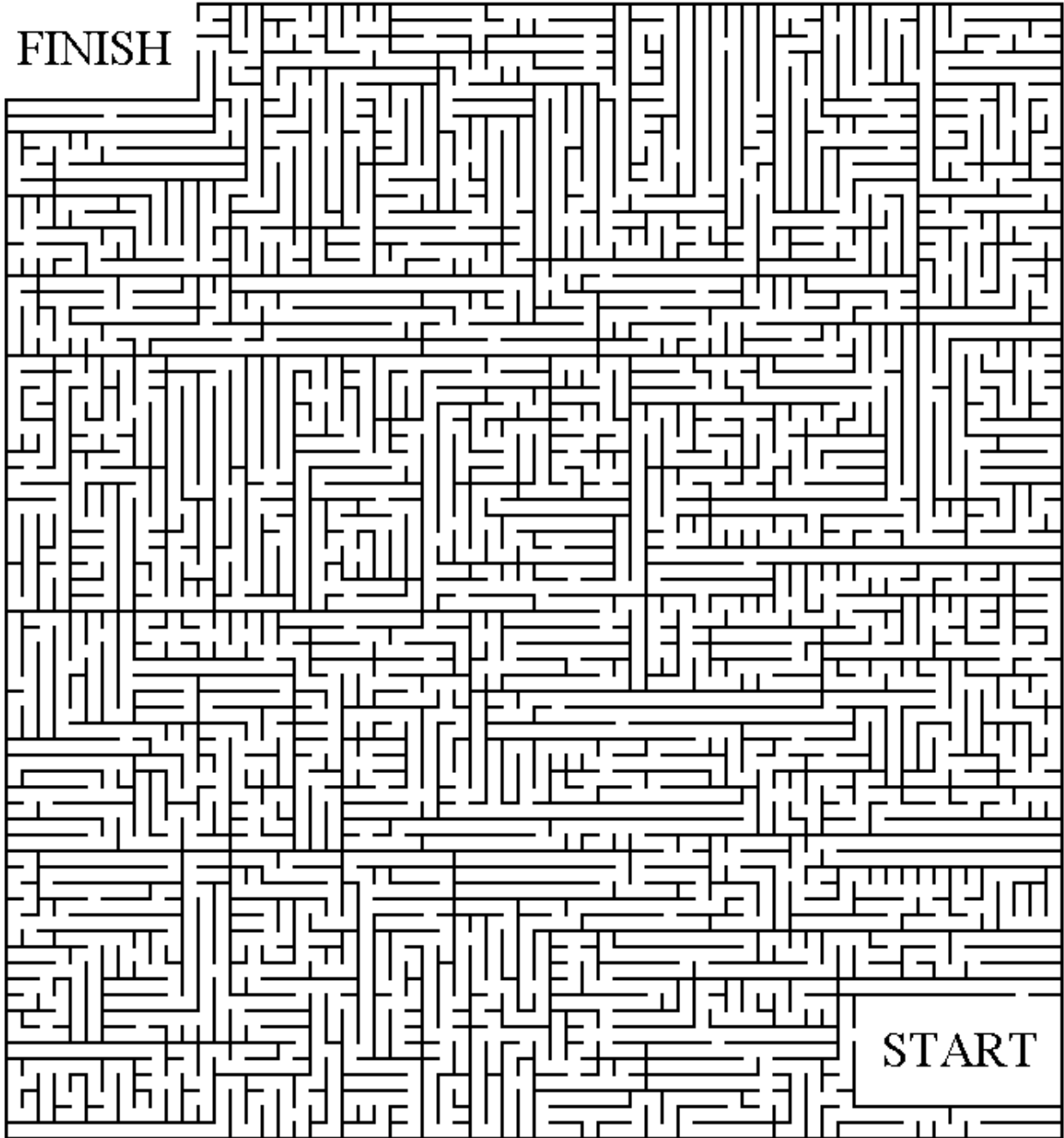
Instructor note: This purpose of this section is to give participants time to reflect on what they have learned, and assess their own understanding of the learning objectives, as well as the 'whys' of goal setting, planning and progress monitoring as essential to successful outcomes.

- Reveal answers to participants. 
- Discuss and final questions or comments.

-- End of Session --

Supporting Handouts

MAZE



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Objectives: By the end of this section I will be able to:

- ❖ Use a company **monthly sales goal** to create a **daily, weekly and monthly sales goal** for myself.
- ❖ **Monitor progress** towards each **daily, weekly and monthly goal** created.

Section 1

Breaking down monthly goals into smaller weekly and daily goals.

Section 2

Monitoring daily and weekly progress toward the monthly goal.

Section 1

Use a company **monthly sales goal** to create a **daily, weekly and monthly sales goal** for myself.

Not All Months Are Created Equally



February only has 28 days, unless it is a Leap Year in which case it is 29 days.

Months with 30 days:

April, June, September, November

Months with 31 days:

January, March, May, July, August, October, December

Some months have 4 weeks.
Some months have 5 weeks.
The first and last week of each month may or may not have 7 days.

STEPS TO PLANNING SALES GOALS : REFERENCE GUIDE

2019



Steps to Planning Sales Goals

REMINDER

- ~ Chart Monday through Friday, and Saturday as a half day.
- ~ Divide the monthly sales goal by the total number of weeks AND days.
- ~ Chart the weekly and daily goals.
- ~ Make S.M.A.R.T. adjustments.

2019



Designed by: 123FreeVectors.com

Calendar Calculation Chart (July, 2019)

	SUN	MON	TUES	WED	THURS	FRI	SAT	TOTAL
WEEK 1		1	1	1	1	1	.5	5.5
WEEK 2		1	1	1	1	1	.5	5.5
WEEK 3		1	1	1	1	1	.5	5.5
WEEK 4		1	1	1	1	1	.5	5.5
WEEK 5		1	1	1				3

25

Calendar Calculation Chart (Blank)

	SUN	MON	TUES	WED	THURS	FRI	SAT	TOTAL
WEEK 1	Red	Yellow	Yellow	Yellow	Yellow	Yellow	Blue	Pink
WEEK 2	Red	Yellow	Yellow	Yellow	Yellow	Yellow	Blue	Pink
WEEK 3	Red	Yellow	Yellow	Yellow	Yellow	Yellow	Blue	Pink
WEEK 4	Red	Yellow	Yellow	Yellow	Yellow	Yellow	Blue	Pink
WEEK 5	Red	Yellow	Yellow	Yellow	Grey	Grey	Grey	Pink



Calendar Calculation Chart (Blank)

	SUN	MON	TUES	WED	THURS	FRI	SAT	TOTAL
WEEK 1								
WEEK 2								
WEEK 3								
WEEK 4								
WEEK 5								

STEPS FOR CALCULATING DAILY & MONTHLY SALES GOAL

- ❑ **Step 1.** Divide the monthly sales goal by the total number of days
 - ❑ $100,000 / 25 = 4000$ This is the daily sales goal
- ❑ **Step 2.** Divide half days by 2
 - ❑ $4000 / 2 = 2000$ This is the daily sales goal for half days
- ❑ **Step 3.** Add the daily goals for each week to determine the weekly total for each week. Example, Week 1;
 - ❑ (Monday through Friday) $4000 \times 5 = 20,000$
 - ❑ (Saturday) $= 2000$
 - ❑ Add the two totals $20,000 + 2,000 = 22,000$
 - ❑ 22,000 is the Weekly Sales Goal
- ❑ **Step 4.** Add each weekly total, which should total the employer monthly sales goal.
 - ❑ (Weeks 1-4) $22,000 \times 4 = 88,000$
 - ❑ (Week 5) $= 12,000$
 - ❑ Add the two totals $88,000 + 12,000 = 100,000$

Charting Calculations of Daily, Weekly, Monthly Sales Goals

Employer Monthly Sales Goal: \$100,000.
Calendar Month: July, 2019
Calculated Weeks: 5 weeks
Calculated Days: 25 days (23 full days, 4 half days)

	Number of Days	Mon	Tues	Wed	Thurs	Fri	Sat	Totals
Week 1	5.5	4000	4000	4000	4000	4000	2000	22000
Week 2	5.5	4000	4000	4000	4000	4000	2000	22000
Week 3	5.5	4000	4000	4000	4000	4000	2000	22000
Week 4	5.5	4000	4000	4000	4000	4000	2000	22000
Week 5	3	4000	4000	4000				12000
								100,000.

Sample Monthly Sales Goals Chart

Employer Monthly Sales Goal: \$100,000.
 Calculated Weeks: 5 weeks
 Calculated Days: 25 days (23 full days, 4 half days)

	Number of Days	Mon	Tues	Wed	Thurs	Fri	Sat	Totals
Week 1	5.5	4000	4000	4000	4000	4000	2000	22000
Week 2	5.5	4000	4000	4000	4000	4000	2000	22000
Week 3	5.5	4000	4000	4000	4000	4000	2000	22000
Week 4	5.5	4000	4000	4000	4000	4000	2000	22000
Week 5	3	4000	4000	4000				12000
								100,000.

Sample Monthly Sales Goals Chart

Employer Monthly Sales Goal: \$ _____
 Calculated Weeks: _____ weeks
 Calculated Days: _____ days (___ full days, ___ half days)

	Number of Days	Mon	Tues	Wed	Thurs	Fri	Sat	Totals
Week 1								
Week 2								
Week 3								
Week 4								
Week 5								

Section 2

Monitoring daily and weekly progress toward the monthly sales goal.

REMEMBER, FUTURE ORIENTATION TAUGHT US TO THINK S.M.A.R.T



In planning for success you need to think proactively.

1. What can I do today?
2. What problems might I face?
3. How will I overcome those problems?
4. When and how will I check my progress?



FUTURE ORIENTATION THINKING AND PLANNING:

1. What can I do today? **Calculate weekly and daily goals**
2. What problems might I face? **Loss of sales days for unforeseen reasons.**
3. How will I overcome those problems? **Adjust the goals to account for problems as they arise.**
4. When and how will I check my progress? **Daily and weekly to monitor progress and make adjustments.**

Making Your Manager's Goals Personal - Final Reflection

- ❖ Explain how backwards sales goal planning is an effective strategy that models future oriented thinking.
- ❖ Briefly list the three important steps to planning a monthly sales strategy
- ❖ Explain the benefit of daily monitoring, as well as the consequence of not monitoring progress.

Making Your Manager's Goals Personal - Final Reflection

- ❖ Explain how backwards sales goal planning is an effective strategy that models future oriented thinking.
 - When the end goal is know, a formula can be made to plan steps towards achieving that goal.
- ❖ Briefly list the three important steps to planning a monthly sales strategy
 - 1. Calculate the number of weeks and days in a month.
 - 2. Divide the monthly sales goal by the number of days and weeks adjusting to any important considerations or anticipated challenges.
 - 3. Monitor progress regularly using tools available by your employer or with a simple ledger or receipt log.
- ❖ Explain the benefit of daily monitoring, as well as the consequence of not monitoring progress.
 - With daily monitoring informed and proactive decisions can be made to maintain momentum towards the final sales goal. Not monitoring progress, is the same as not planning. No plan, no goal.

ADVANCED APPLICATION (Page 1)

Using the Monthly Sales Goal of \$100,000 and the July, 2019 the following content illustrates the use of the weekly and daily sales goals to apply Future Orientation Mindset and Proactiveness skill set to consider adjustments that would increase the likelihood of meeting or exceeding the monthly sales goal.

To determine **WEEKLY SALES GOAL**:

- Divide **Monthly Sales Goal** (\$100,000) by number of weeks (5).
- ◆ $\$100,000 / 5 = \$20,000$. Weekly sales goal

To determine **DAILY SALES GOAL**:

- Divide **Weekly Sales Goal** (\$20,000) by number of days in each week
- ◆ Week 1 $\$20,000 / 5.5 =$ $\$3636.36$ sales per day
- ◆ Week 2 $\$20,000 / 5.5 =$ $\$3636.36$ sales per day
- ◆ Week 3 $\$20,000 / 5.5 =$ $\$3636.36$ sales per day
- ◆ Week 4 $\$20,000 / 5.5 =$ $\$3636.36$ sales per day
- ◆ Week 5 $\$20,000 / 3 =$ $\$6666.66$ sales per day

- ★ What is different in week 5 from weeks 1 through 4?
 - The week with the fewest days has the highest daily sales goals
- ★ How will this create a challenge to meeting the monthly sales goal?
 - The last three days require the highest sales.
- ★ What adjustments can be made to solve for this problem?
 - Recalculate by dividing the monthly sales goal by the total number of sales days
 - $100,000 / 25 = 4000$. Daily Sales Goal
- ★ How does this impact the weekly sales goal total?
 - The weekly sales goal will be determined based on the number of days in each week.
 - Week 1 (5.5 days) $5.5 \times 4000 = 22,000$
 - Week 2 (5.5 days) $5.5 \times 4000 = 22,000$
 - Week 3 (5.5 days) $5.5 \times 4000 = 22,000$
 - Week 4 (5.5 days) $5.5 \times 4000 = 22,000$
 - Week 5 (3 days) $3.0 \times 4000 = 12,000$

ADVANCED APPLICATION (Page 2)

Employer Monthly Sales Goal
\$100,000

Target Calendar Month:
July, 2019

Monthly Goals Planning Chart				Reference Planning Calendar						
	Full Days	Half Days	Total	JULY 2019						
Week 1	5	1	5.5	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week 2	5	1	5.5	1	2	3	4	5	6	
Week 3	5	1	5.5	7	8	9	10	11	12	13
Week 4	5	1	5.5	14	15	16	17	18	19	20
Week 5	3	0	3	21	22	23	24	25	26	27
				28	29	30	31			
<p>Calculated Weeks: 5 weeks Calculated Full Days: 23 Calculated Half Days: 4 (.5) = 2 Calculated Total Days: 25</p>				<p>Sales Work Week Monday - Friday: Full Days Saturday: Half Days</p> <p align="center"><small>www.print-2019-calendar.com</small></p>						

Target Daily and Weekly Sales Goals

	Days	Mon	Tues	Wed	Thurs	Fri	Sat	Totals
Week 1	5.5	4000	4000	4000	4000	4000	2000	22,000
Week 2	5.5	4000	4000	4000	4000	4000	2000	22,000
Week 3	5.5	4000	4000	4000	4000	4000	2000	22,000
Week 4	5.5	4000	4000	4000	4000	4000	2000	22,000
Week 5	3	4000	4000	4000	NA	NA	NA	12,000
								100,000.

Future Orientation Mindset:

- What problems might I face?
 - No room for error
- What are the possible solutions?
 - Reduce week 5 goals by 20%. Redistribute 20% over weeks 1-4.

Proactiveness Behavioral Skill

- Reduce the weekly and daily sales goals of week 5, and redistribute evenly in weeks 1 through 4 to slightly increase the daily and weekly sales goals in weeks 1 through 4.
- Potentially, the monthly sales goal will not only be met, but possibly exceeded.

ADVANCED APPLICATION (Page 3)
ADJUSTED WEEKLY GOALS

	Days	Mon	Tues	Wed	Thurs	Fri	Sat	Totals
Week 1	5.5	4000	4000	4000	4000	4000	2000	22,000 + 600
Week 2	5.5	4000	4000	4000	4000	4000	2000	22,000 + 600
Week 3	5.5	4000	4000	4000	4000	4000	2000	22,000 + 600
Week 4	5.5	4000	4000	4000	4000	4000	2000	22,000 + 600
Week 5	3	4000	4000	4000	NA	NA	NA	12,000 - 2400
								100,000.

<p>How to Calculate 20% of 12,000</p> <p>(the weekly goal for week 5)</p>	<p>Multiply week 5 goal (12,000) by 20% (.20) $12,000 \times .20 = 2,400$</p> <p>Subtract the answer (2,400) from the week 5 goal (12,000) $12,000 - 2,400 = 9,600$</p> <p>Divide the answer (9,600) by the 4 (the first 4 weeks) $9,600 / 4 = 600$</p> <p>Divide the answer (600) by the number of days in that week (6) $600 / 6 = 100$</p> <p>Add the answer (100) to each daily goal (4,000 or 2,000) $4,000 + 100 = 4100$ (Monday - Friday) and $2,000 + 100 = 2100$ (Saturday)</p> <p>Recalculate the daily goals to get the new weekly goal. $4,100 \times 5 = 20,500 + 2,100 = 22,600$</p> <p>Recalculate the weekly totals $22,600 \times 4 = 90,400 + 9,600 = 100,000$</p>
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ADJUSTED DAILY & WEEKLY GOALS

	Days	Mon	Tues	Wed	Thurs	Fri	Sat	Totals
Week 1	5.5	4100	4100	4100	4100	4100	2100	22,600
Week 2	5.5	4100	4100	4100	4100	4100	2100	22,600
Week 3	5.5	4100	4100	4100	4100	4100	2100	22,600
Week 4	5.5	4100	4100	4100	4100	4100	2100	22,600
Week 5	3	3200	3200	3200	NA	NA	NA	9,600
								100,000

