



Set a routine – protect and follow – stay focused and on track – maintain a healthy life / work balance



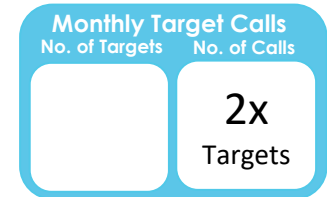
F2F calls | Build relationships, Driving Value, Seek Opportunities, Close on Business

- Log all by the end of the day
- Set a memorable Subject line – include Notes / Reminders in Comments and who you met, important information and required follow up – Set up a Task  or a Case 
- Name – Pick key Contact in the call, list others in the Comments
- Related to – Set as Account or Opportunity



Target Accounts and Calls | New Business Growth




- Set Targets, develop a plan and take action – be accountable to your Sales Plan



Quotes to Opportunities

- Assign appropriately – provide direction to your ATR to help you out

Opportunity & Forecast Management

- Manage all new Opportunities Daily – SEE Opportunities Created Yesterday on the Sales Activities | Accountability Dashboard report – adjust and start the Opportunity off correctly.
- Include only Opportunities that you are focusing on This Month
- Log follow up Phone calls  Emails  and post Chatter  to keep the company informed
- Adjust Stage and Close Date – Leave no open Opportunities in the Past
- Adjust Account Monthly Opportunities based on actual sales intake
- Set small Opportunities as Record Type = Non-Forecast Quotes
- Log Opportunity Follow-Up calls

- Click on your Opps This Month come to open your report – manage your Opportunities



Accounts & Contacts

- Set up New Accounts & Contacts by the end of the day – be precise.
- Update Contacts as you visit your Accounts – add new, update titles, phone etc., make inactive if employee has left | Set up our company to provide the best CX

- Use your Sales Activities | Accountability Dashboard reports to hold yourself accountable



Dashboard
Sales Activities | Accountability