

# MONTHLY SALES TRACK

JAN – FEB – MAR – APR – MAY – JUN – JUL – AUG – SEP – OCT – NOV – DEC



## SALES CONSULTANT

--

## WORKING DAYS

--

## CURRENT MONTH GOALS (TOTAL)

SALES	APPT.	UPS

## CURRENT MONTH GOALS (DAILY)

SALES	APPT.	UPS

## PREVIOUS MONTH FINAL TOTALS

<b>SALES</b>	
--------------	--

	<b>SET</b>	
<b>APPOINTMENTS</b>		<b>SOLD</b>

	<b>TAKEN</b>	
<b>FRESH-UPS</b>		<b>SOLD</b>

	<b>APPTS.</b>	
<b>CLOSING %</b>		<b>UPS</b>

## CALCULATIONS

1. Agree on a current month total sales goal.
2. Take the total sales goal and divide by the total amount of working days this month to determine your daily sales goal.
3. Divide previous months "sold appointments" into previous months "sales" to determine what % of sales came from appts.
4. Take the "sales goal" and multiply by this number (ex: if the number was 56% multiply by .56) to get how many of the current month's sales are needed from appointments.
5. Divide previous month "appt. sold" by "appt. set" to get your appointment closing %.
6. Divide sales needed from appointment by this % in decimal form to get your total amount of appointments needed for the month.
7. Take this total and divide by the total amount of working days to determine the daily "appointment set" goal needed.
8. Take the current month sales goal total and subtract sales needed from appointments to determine your remaining total sales needed for the month from "fresh-ups."
9. Divide the previous month's sales that were not appointments by the total of "fresh ups" to get your fresh-up closing %.
10. Divide sales needed from "fresh ups" by this % in decimal form to get your total amount of "fresh-ups" needed for the month.
11. Take this total and divide by the total amount of working days to determine the daily goal needed.
12. Take your daily goal needed for sales, appts., and ups and put them under the "G" side of the first working day. The 2<sup>nd</sup> working day should be the daily goal x2, the 3<sup>rd</sup> day x3, etc..
13. Fill out the "G" side of the month completely and then fill in the "A" (actual) side each day with the previous day's efforts.
14. Each day's "A" efforts should be added to the previous day's number to create a running total.

**SALES**  
**APPT.**  
**UPS**

**SALES**  
**APPT.**  
**UPS**

**SALES**  
**APPT.**  
**UPS**

**SALES**  
**APPT.**  
**UPS**

**SALES**  
**APPT.**  
**UPS**

	1st	2nd	3rd	4th	5th	6th	7th
<b>SALES</b>	G    A	G    A	G    A	G    A	G    A	G    A	G    A
<b>APPT.</b>							
<b>UPS</b>							
	8th	9th	10th	11th	12th	13th	14th
<b>SALES</b>	G    A	G    A	G    A	G    A	G    A	G    A	G    A
<b>APPT.</b>							
<b>UPS</b>							
	15th	16th	17th	18th	19th	20th	21st
<b>SALES</b>	G    A	G    A	G    A	G    A	G    A	G    A	G    A
<b>APPT.</b>							
<b>UPS</b>							
	22nd	23rd	24th	25th	26th	27th	28th
<b>SALES</b>	G    A	G    A	G    A	G    A	G    A	G    A	G    A
<b>APPT.</b>							
<b>UPS</b>							
	29th	30th	31st	<p><i>*Strike through all days closed and days off to determine accurate number of monthly working days.</i></p> <p>I fully understand my sales performance expectations for the month, and I commit to achieving the agreed upon written goals on this sheet to the best of my abilities.</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%; border: 1px solid black; height: 30px;"></div> <div style="width: 45%; border: 1px solid black; height: 30px;"></div> </div> <p style="text-align: center; margin-top: 5px;">employee signature <span style="float: right;">date</span></p>			
<b>SALES</b>	G    A	G    A	G    A				
<b>APPT.</b>							
<b>UPS</b>							