

Tracking Your Production

In order to move your business forward it is imperative that you track your production to gauge or monitor:

- Production vs. goals set
- Conversion ratios
- Percentage of business by source and method

Understanding your business, monitoring your ratios and results will allow you to make adjustments as necessary in the area of the sales process where improvement will enhance performance.

The following tools have been created to aid you in accomplishing your goals, monitor and track your production. Files for these forms are in the C.D. provided with this manual.

Daily Discipline Planner

The Daily Discipline Planner is geared to help you plan your day, stay focused on your goals and review and rate your performance. The best time to plan for your day is the night before. Insert your daily goals you have assigned for yourself.

Smart Sales Solutions Daily Discipline Planner					
Rep Name: _____					
Date: _____					
<u>Dials/Face to Face:</u> (first time)					
<u>New Goal</u>	<u>New Actual</u>	<u>Diff (+/-)</u>	<u>Follow up Goal</u>	<u>Follow up Actual</u>	<u>Diff (+/-)</u>
<u>Reaches/Contacts made:</u>			<u>APPT's Set:</u>		
<u>Goal</u>	<u>Actual</u>	<u>(+/-)</u>	<u>Goal</u>	<u>Actual</u>	<u>(+/-)</u>
<u>APPT's Held:</u>			<u>Demonstrations/Presentations:</u>		
<u>Goal</u>	<u>Actual</u>	<u>(+/-)</u>	<u>Goal</u>	<u>Actual</u>	<u>(+/-)</u>
<u>Sales Made:</u>			Role Play/Script Rehearse – Y/N _____		
<u>Goal</u>	<u>Actual</u>	<u>(+/-)</u>	Plan next day – Y/N _____		
			Rate your day _____		
<u>Today's Appointments:</u>			<u>Today's Follow to Close:</u>		
<u>Prospect</u>	<u>Time</u>	<u>Results</u>	<u>Prospect</u>	<u>Time</u>	<u>Results</u>
1.			1.		
2.			2.		
5.			<u>Today's Priority/Task To Do List</u>		
			<u>Task</u>	<u>Completed</u>	
6.			1.		
7.			2.		

Log your appointments and key follow-up calls, as well as any key tasks. On the actual day at the end, write in your actual production, compute the difference. Write in the results of your appointments then rate your day. Take a few minutes to review and debrief with yourself the highs and lows of your day. Rate yourself conservatively. Then repeat the process again by completing the information for the next day. Include one month of pages in the “Daily Discipline Planner” section in **Apply and Track**.

Daily Tally Sheet

Use to track your production numbers. For most accurate results tally immediately after action completed. Use hash marks and block in groups of five. Insert one sheet for each day of the month in the "Daily Tally" section of **Apply and Track**.

Smart Sales Solutions Daily Tally Sheet

New Dials	Follow-up Dials	Reaches/Contacts	Appointments Set	Appointments Held	Presentations/Demos	Sales Made	Sales Pending

TOTALS:
 0 0 0 0 0 0 0 0

NAME: _____ **DATE:** _____

Weekly Reach and Presentation Log Summary

Use to log the results of reaches and presents with your prospects. This tool is useful for monitoring what objections are preventing you from moving the sales process forward. For best results log immediately after reach/present and give detailed information.

Smart Sales Solutions Weekly Reach Log Summary

<u>DATE</u>	<u>PROSPECT</u>	<u>RESULT</u>	<u>OBJECTION</u>

Tracking Your Production (cont'd)

Smart Sales Solution
2026 Monthly Client Report

Company Name: _____

Month of January

		Units	Gross	Commission	% of	Lead	Prospect	Media
	Client/Company	Sold	Sales (\$)	Earned	Earned	Source	Method	Channel
1					#DIV/0!			
2					#DIV/0!			
3					#DIV/0!			
4					#DIV/0!			
5					#DIV/0!			
6					#DIV/0!			
7					#DIV/0!			
8					#DIV/0!			
9					#DIV/0!			
10					#DIV/0!			
TOTAL:		\$0.00	\$0.00	\$0.00	#DIV/0!			

Marketing Budget Variance Report

Track your marketing dollars budgeted by each media channel, income generated and return on investment for each channel. This allows you to keep an updated pulse on how your marketing dollars are working for you. Track yearly numbers as well. Media channel number can be taken from Monthly Client Transaction Report. Print the most recent month at Month end as well as year to date page and insert appropriately in **Apply and Track**.

Variance Report

Company Name: _____

Month: _____

	Media Channel	Monthly Amount Budgeted	Actual Expenses	Variance(+ -)	Total Income Generated	ROI (Income / Act. Exp.)
1				\$0.00		#DIV/0!
2				\$0.00		#DIV/0!
3				\$0.00		#DIV/0!
4				\$0.00		#DIV/0!
5				\$0.00		#DIV/0!
6				\$0.00		#DIV/0!
7				\$0.00		#DIV/0!
8				\$0.00		#DIV/0!
9				\$0.00		#DIV/0!
10				\$0.00		#DIV/0!
TOTAL:		\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!