

BUSINESS ACTION PLANNING SHEET

CANDIDATE INFORMATION

Name:

Date:

Title:

Company Name:

Industry:

Time in Sales/Sales Leadership:

Current Position:

Length in Current Position:

Cell Number:

In two paragraphs or less, describe your current position and your responsibilities:

What do you desire to gain from Coaching?

IF YOU ARE A "PRODUCING MANAGER/LEADER"

What are your current strengths in selling?

What are your weaknesses in selling?

When selling, what are "Income Producing Activities" or "Business Building Activities"

Do you currently measure your Income Producing Activities on a daily, weekly, monthly basis or not at all?

When selling, what are your typical outputs in the following areas?

<i>Average number of...</i>	GOAL	ACTUAL
SALES CALLS PER DAY:		
QUALIFIED CONTACTS PER DAY:		
APPOINTMENTS SET PER DAY/WEEK:		
PRESENTATIONS PER DAY/WEEK:		
CUSTOMERS PER MONTH:		

On a scale of 1-10, how proficient are your selling skills in each of these areas? (1 being “Poor” and 10 being “Excellent”)

PROSPECTING:

QUALIFYING, QUESTIONING, AND PROBING:

PRESENTATION SKILLS:

ANSWERING OBJECTIONS BEFORE THEY COME UP:

CLOSING:

ASKING FOR AND GETTING REFERRALS:

FOLLOW-UP:

SOCIAL MEDIA:

GETTING REPEAT BUSINESS:

What was your sales/revenue productivity last year in terms of income?

FOR LEADERSHIP:

What are your current strengths?

What are your weaknesses?

In leadership, what are “Income-Producing Activities” or “Business Building Activities”

Do you currently measure your Income Producing Activities on a daily, weekly, monthly basis or not at all?

In leadership, what are your typical outputs in the following areas?

GOAL

ACTUAL

RECRUITING/HIRING:

ONBOARDING:

TEAM BUILDING:

ONE-ON-ONE TIME WITH TEAM:

SHADOW DAYS WITH TEAM:

OTHER:

Who, other than you, effectively holds you accountable?

On a scale of 1-10, how fulfilled are you in your career? Why?

What are you doing on a regular basis to continue to learn new skills that will help you in your business and your leadership?

On a scale of 1-10, how proficient are you at managing your time to be as efficient as possible (1 being reactive and 10 being proactive)?

What percentage of your time do you spend on Income Producing Activities (IPAs)?

On a scale of 1-10, how proficient are you in these leadership areas? (1 being “Poor” and 10 being “Excellent”)

RECRUITING/HIRING:

ONBOARDING:

TEAM BUILDING:

ONE-ON-ONE TIME WITH TEAM:

SHADOW DAYS WITH TEAM:

DELEGATION:

PLANNING FOR GROWTH:

IMPLEMENTING SYSTEMS FOR GROWTH:

COMPENSATION STRUCTURE:

RAISING UP OTHER LEADERS:

EMOTIONAL INTELLIGENCE:

HOLDING PEOPLE ACCOUNTABLE:

CASTING VISION:

OTHER:

How much growth have you experienced?

3 YEARS AGO:

2 YEARS AGO:

1 YEAR AGO:

If 100% is your maximum potential, what percentage do you think you are currently operating at and why?

What are your goals for the next 12 months?

If you had a personal coach holding you accountable to your goals and helping you in the areas of business growth and leadership you desire...

WHAT PERCENTAGE INCREASE DO YOU THINK YOU COULD EXPECT?

WHAT WOULD BE THE AFFECT ON THE PEOPLE YOU LEAD?

WHAT WOULD BE THE AFFECT ON THE OVERALL GROWTH AND GOALS OF THE COMPANY?

Approximately how much would that increase translate to in increased personal income?