

WRITTEN, SPECIFIC GOALS

LIFE GOALS

DATE TO COMPLETE

CAREER GOALS

DATE TO COMPLETE

FAMILY GOALS

DATE TO COMPLETE

ANNUAL GOALS

DATE TO COMPLETE

MONTHLY GOALS

DATE TO COMPLETE

WEEKLY GOALS

DATE TO COMPLETE

TOP TEN ACCOUNTS

1-20

DOLLAR VOLUME

1)

2)

3)

4)

5)

6)

7)

8)

9)

10)

NEXT 11-20

DOLLAR VOLUME

11)

12)

13)

14)

15)

16)

17)

18)

19)

20)

TOP 5 OPPORTUNITIES TO CLOSE IN THE NEXT 30 DAYS

STEPS TO CLOSE

DATE TO CLOSE

1)

2)

3)

4)

5)

TOP 5 OPPORTUNITIES TO CLOSE IN THE NEXT 60 DAYS

STEPS TO CLOSE

DATE TO CLOSE

1)

2)

3)

4)

5)

TOP 5 OPPORTUNITIES TO CLOSE IN THE NEXT 90 DAYS

STEPS TO CLOSE

DATE TO CLOSE

1)

2)

3)

4)

5)

POSITIVE UPBEAT PERSONALITY

WHAT ARE MY PERSONALITY STRENGTHS?

WHAT ARE MY PERSONALITY WEAKNESSES?

HOW CAN I IMPROVE MY WEAKNESSES?

DATE TO COMPLETE

WHAT ARE MY STRENGTHS AS A SALES REP?

WHAT ARE MY WEAKNESSES AS A SALES REP?

HOW CAN I IMPROVE MY WEAKNESSES?

DATE TO COMPLETE

WHAT ARE SOME UNIQUE THINGS I CAN DO TO GO THE EXTRA MILE FOR MY CUSTOMERS OR MY COMPANY?

WHAT ARE SOME THINGS I DO THAT ARE TIME WASTERS? (KEEP A DAILY LOG FOR 1 WEEK AND TRACK YOUR TIME. THEN WORK TO ELIMINATE THEM)

OPEN ENDED, HIGH VALUE QUESTIONS FOR MY PRODUCTS?

TOP DEMOS USED WITHIN OUR COMPANY

PRODUCT

DEMO

EXPERT

- 1)
- 2)
- 3)
- 4)
- 5)

SAVINGS GOALS

YEAR	AMOUNT SAVED	TOTAL NET WORTH
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1 YEAR

5 YEARS

10 YEARS

15 YEARS

20 YEARS

CREATIVE THINGS I CAN DO TO BE DIFFERENT THAN
OTHER SALES REPS OR ASSOCIATES

1)

2)

3)

4)

5)

6)

7)

8)

9)

10)

MISSION STATEMENT FOR YOURSELF

NOTES