

Strategic Planning Day

Q3 2022

Activator Q3 - Optimizing your Sales

1. Sales Mindset - The 4 Ms of Money

- M for Making Money
 - How much money you want to make _____
 - How long do you want it to take you _____
- M for Managing your Money
 - Do you have your key number for the last 90 days?
 - Revenue (Money coming in) _____
 - Expenses (Money coming out) _____
 - Net profit (What's left) _____
- M for Multiply your Money
 - Where can I invest money in my business to scale
 - Marketing _____
 - Systems _____
 - Team _____
 - Savings for future investment _____
 - Personal Development _____
- M for Minister your Money
 - Where do I want to contribute
 - Outside of my biz _____
 - Pro bono _____
 - Scholarship fund _____

2. Sales Leads

What scenario is true for you today

- Option 1 - I have enough incoming leads, but they are not converting enough

- Option 2 - My conversion rate is good, but I don't have not enough leads

What are the solutions

- Option 1 - I need to review and optimize my Lead Nurturing and my Sales process to see why it is not converting

- Option 2 - I need to do some more Lead Generation activity to generate more leads

3. Sales Process

Check what your Prospects/Warm Leads are going through in the Sales Process

- ✓ ☐ Your Prospects are going through an automated tool to schedule a call
- ✓ ☐ They need to answer questions before the Sales Call
- ✓ ☐ They receive an In-Preparation Email before the call
- ✓ ☐ They can learn more about you by watching an interview of you
- ✓ ☐ They can learn more about the results you bring to your clients by watching Testimonials
- ✓ ☐ They go through a process during the call where they feel heard and seen
- ✓ ☐ They have access to your offer with prices during the call
- ✓ ☐ They get answers to their objections
- ✓ ☐ They can close the deal on the call
- ✓ ☐ They know what the next step is

4. Sales System

Check what Systems you need to put in place in your Business from the below

1. How many hours do you dedicate to sales per week?

2. Do you have a Hot List / or a CRM?

3. Do you have a Scheduling Tool with Questions for your leads?

4. Do you have a page with your offer that you can share during the call?

5. Do you have a payment system that your clients can use as soon as they are ready to pay?

6. Do you have a New Client Onboarding system ready?

7. Do you have a Follow up System for your pipeline of Hot Leads (proposals)?

8. Do you have a Follow up System for your Warm Leads (Prospects)?

5. Questions from the Homework

- *What is your sales process? From the first contact with the lead until they close the deal*

How can you improve it

- *How many hours on average a week do you spend on sales*

- Sales calls _____
- Lead follow up _____
- Proposals _____
- Proposal follow up _____

How can you improve it

- *How many sales calls (or sales enquiries if you don't have sales calls) did you have in the last 3 months*

How can you improve it

- *How many proposals (or clients that were exposed to your prices if you don't send proposals)?*

How can you improve it

- *What is your conversion rate from lead to sales call (or from potential client to enquiry)?*

How can you improve it

- *What is your conversion rate from sales calls to closing the sales?*

How can you improve it

- *Do you have someone in your team who gives you support in sales?*

How can you improve it
