



## **What is Your Business Development Plan? (7-6)**

### **Develop a Plan**

Regardless of a person's reason for making a sales call, knowing what a person wants to accomplish and what they are going to say is important. Knowing these two things will give a person a much greater chance to meet their objective.

### **This can best be accomplished with Two Tools**

#### **Business Development Call Form**

By completing this form, you will be able to review your sales call, plan your strategy for the next visit, and plan your strategy for your next call. Analyze what you are doing right or wrong in the selling process and communicate with other leaders who might be able to give you some of their input.

#### **Plan for Success**

Spend enough time to develop your sales plan to maximize your effectiveness, your efforts, and your areas that need to be changed.

## **What is Your Business Development Call Plan and Are You Applying Daily?**

### **How Can We Serve You Today?!**



**Activities**

Area	Total
Did you work Linked In? How many InMail's did you send? Social Media? Engagement Postings (Folder 44)?	
How many emails did you send – Clients and/or partners?	
How many people did you approach in your warm market?	
How many businesses did you visit?	
Chamber of Commerce, Associations, and organization meetings attended (networking)	
Procurement Association Meetings Attended	
How many business cards and flyers did you leave out?	
How many follow-up calls were made to those you have contacted before?	
How many leads did you purchase from our lead and list partner?	
How many appointments did you purchase from our marketing and call center partners?	
How many people did you approach to refer to you clients?	
Did you conduct meetings with your referrals, network, people you know, etc.?	
How many other things did you do?	
Other Notes	



### Prospecting Activities

How many prospects did you contact from your activities?	Notes

### Team Activities

How many Referrers did you share ATS with?	Notes
Did you conduct a call with each person / organization to maintain goal setting, planning, and results?	
Did you help your people with relationship, marketing, and business development?	

### Referring Activities

How many referrers did you enroll (CPA firms, accounting firms, business consultants, insurance agents, realtors, brokers, etc.)?	Notes
Did you follow-up with others in the way of customer service?	

### Weekly Appointments

How many appointments did you arrange?	Notes
How many appointments did you arrange and others in your network arrange?	
How many appointments were kept?	
Notes	



**Weekly Client Sales Closed**

From your appointments, how many prospects became clients?	

**New Client Projects Started**

How many new client projects were started?	Notes

**What areas need changing, improved upon, and added to improve performance?**

List the areas, provide solutions, and activate	Notes



©ATS

**30+ years growing people, procurement, and projects!**