

Sales Activities: Analysis Worksheet Sample

My sales activities over the last __12__ months are as follows.

1. In column one list all of the sales activities you do.
 - a. In column two Yes/or No, were you doing these activities 8 weeks prior to a peak?
 - b. In column 3, if so how often, how much time did you spend, and what did it cost you?
 - c. In Column 4 what was the result?
 - d. In column 5, were you doing this activity prior to a low?
 - e. In Column 6, if so how often, how much time did you spend, and what was the cost?
 - f. In Column 7, what was the result?

List of Sales Activities	8 weeks prior to a peak?	How often? How much time did you spend? How much money did it cost?	What was the result?	8 weeks prior to a low?	How often, how much time, and how much did it cost?	What was the result?
Cold calls	Yes	40 per week: 5-7 hours per week: \$0	20 face to face meetings	No		
Face to face meetings	Yes	32 total: 50 hours total: \$500	6 new clients: \$3600.00	No		
Psychology today	Yes	Online profile \$348 per year	10 clients \$6000.00 annual	Yes		
Networking events	Yes	4 total, 8 hours, \$100	1 client \$500.00	Yes	4 total, 8 hours, \$100.00	2 clients, \$1200.00
Blog posts	Yes	8 posts, 16 hours, \$99 annual	Uptick in web traffic	Yes	4 posts, 8 hours \$99 annually	Uptick in web traffic
Facebook Content	Yes	Daily posts, 14 hours, \$0	1 client: \$500	Yes	Daily posts, 14 hours, 0	2 clients, \$1200

2. List 5 to 10 activities you were doing prior to a peak that resulted in the best ROI
 - a. Cold Calls
 - b. Face to face meetings
 - c. Psychology Today
 - d. Networking events
3. List the 5 to 10 activities you were doing prior to a low that resulted in the best ROI
 - a. Psychology today
 - b. Networking events
 - c. Facebook Content
4. What top ROI activities were you NOT doing before a low?
 - a. Cold Calls
 - b. Face to Face meetings
5. What are your best ROI activities?
 - a. 40 Cold Calls/week (which yield face to face meetings)
 - b. 4 Face to Face meetings/week
 - c. Psychology Today
 - d. Networking Events (2 per month)
 - e. Daily Facebook Content
6. Modify the frequency and amount of your best ROI activities so that you can consistently do them during Peak/or busy times.
 - a. 10 cold calls per week
 - b. 1-2 face to face meetings per week
 - c. Psychology Today
 - d. Networking events (2 per month)
 - e. Daily Facebook Content