

# PROFITABLE PRINT RELATIONSHIPS

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## The Successful Print Sales Circle

### Worksheet 35: Goals And Metrics

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#### Step 1: Decide your goals

What would you like to do more of over the coming months? Look back at your new habits task in month 16 as well as your monthly review that you created last month. From this you can create a short list of new tasks that you would like to carry out more of. Feel free to add personal as well as work goals.

#### List your potential goals

#### Step 2: Decide your goal targets

You can only say whether you have achieved a goal or not by creating an end target. The target will ideally be result based. For instance, if you want to sell more, you could decide to bring in a specific amount of revenue. Also, decide how long you want to carry this activity out for whilst you measure it. I recommend at least three months. However, a good target will last for a year.

#### Add specific targets and timelines to your goals

### Step 3: Create your journey

How will you achieve your end target? When you are looking at a results-based metric, you will need to think about the activity that you need to carry out to achieve this goal. For instance, in the case of sales, it is helpful to map out the typical prospect journey and conversion ratio. In simple terms, for a traditional sales approach, this may look like:

- Win client
- Meeting
- Call
- Prospect list

Alternatively, from a social media sales approach this may look like:

- Win client
- Getting to know you call
- Create engaged followers
- Create connections
- Request connections

#### **Add specific weekly activities to your goals**

### Step 4: Calculate your activities

Now you have mapped out the right activities, it is time to add conversion rates to each stage of your journey.

In simple terms, for a traditional sales approach, this may look like:

- Revenue from a typical client (therefore how many clients do you need to achieve your goal)
- Number of meetings required to convert a prospect
- Number of calls required to gain a meeting
- Number of prospects required to have a successful call

Alternatively, from a social media sales approach this may look like:

- Revenue from a typical client client (therefore how many clients do you need to achieve your goal)
- Number of calls required to convert a connection
- Number of engaged followers required to gain a call
- Number of connections required to create an engaged follower

- Number of connection requests required to create a connection

**Write down your conversion rates**

## **Step 5: Set your weekly goals**

Now you have conversion rates, you know exactly how much activity you need to carry out in order to achieve your target. Next, simply divide your total numbers by the number of weeks you will carry out your goal. Now you have your weekly activity goals.

It is always good to add a little extra time to your goal. This is because:

- You won't always achieve your goals every week
- You need holiday/vacation time
- It won't be appropriate to carry out the final steps in your prospect journey at the beginning of the project
- It won't be appropriate to carry out the first steps in your prospect journey at the end of the project

**Write down your weekly activity goals**

## **Step 6: Find an accountability partner**

An accountability partner is someone who will help you stay on track with your goals. Find a colleague or friend or family member who you can report into every week. Ideally, you can help them with a similar project.

When you report to them every week, state:

- If you carried out the right activities
- If they created the right results
- If you encountered any challenges and what you can do to overcome them

The aim of an accountability partner is to keep you on track, keep you focussed and motivated and to act as a sounding board if things are not going according to plan. If you are a gold member, I can help you with accountability.

### **Write down your accountability partner**

## **Step 7: Share your success!**

This final assignment will give you real focus for your sales and other activities. Here is your goal for this month:

- Create a goal
- List all the metrics associated with it
- Find an accountability partner

Next month we will start a new and exciting phase of The Successful Print Sales Circle. Look out for my e-mail that explains more!

How did you find this exercise? Please share your results with us at [circle@ProfitablePrintRelationships.com](mailto:circle@ProfitablePrintRelationships.com) If you come across any challenges you will be able to raise them on the monthly group call. If you are a gold member you can ask any questions privately on your exclusive e-mail address.