

Sales Activity Planner

Setting and measuring sales activity goals will help your team drive their pipeline forward. Use this template to help your team set those goals and create a plan of action.

High impact activities

Write down the high impact activities that drive the process forward, like prospecting.

Top 3 priorities for your week

Write down the top three activities you're going to make a priority in your week. Be specific, and set activity goals that you'd like to reach.

1.

2.

3.

Schedule your activities

Many hard-working sales people struggle with their activity levels. This can be down to many reasons, but it can be difficult to get started on some of these tasks. That's why this stage is critical.

Use the calendar below to plot out when you plan to carry out each of your high impact sales activities. If you find it hard to dive into these tasks, try to be very specific about when and, where possible, do it at the same time every week. This helps turn the activity into a habit, and eventually you'll get started without even thinking.

Here's an example of how you can formulate this specific schedule:

- After I _____, I will (do high impact activity).

For you, this could be something like, "After I sit down at my desk after lunch, I will make 20 prospecting calls."

	Monday	Tuesday	Wednesday	Thursday	Friday
Morning					
Afternoon					