

3

*For Sales Teams:
Your Guide to
Building a
Personal &
Business Work
Plan*



The sales position your people hold is the vehicle to get them where they want to go. Their personal goals are the fuel that keeps the vehicle moving. If you have the right people, and you create the environment where they can explore what really motivates them, their own personal goals will drive sales goals that exceed any goal you set for them.

Most companies implement a goal setting process with their sales team, but not all are effective. An effective goal setting process starts with the individual, not the company. Your people don't really care about shareholder value. They care about eliminating debt, security for their family, building a deck, paying for college, getting ready to write a big check for a wedding, taking the 'bucket list' vacation and planning for their retirement.

Writing business plans is an effective way to help salespeople translate their personal goals and financial requirements into an outline of how they will run their sales practice so that it generates the revenue required to meet their personal goals. Your Guide to Building a Personal & Business Work Plan will help RMs and their leaders:

- ◆ **Create a personal and business workplan that will help drive desire and commitment for extraordinary success in sales**
- ◆ **Establish and connect personal goals with business goals so that both can be more consistently reached**
- ◆ **A template to implement a series of disciplined processes to help salespeople stay on track and focused on the priority drivers of their business**

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