GOALS THAT MATTER
Let's do the Math!

MASTER CONNECTORS

1. What were your net sales in the last 12 months?
(a)

2. How many clients did you serve in the last 12 months?
(b)

3. What was your Make a Difference Goal
(d)

4. How many NEW CLIENTS did you onboard in the last 12 months?
(f)

old clients *new clients*

5. How many sales conversations did you have in the last 12 months?
(g)

STEP 1:

Write Your 12 mos. Net Sales here: (a) $_____

Write # of Clients served in the last 12 mos here: (b) _____

(a) $_____ / (b) _____ =

Average annual value of a client: (c) $_____

STEP 2:

Write Your MAD goal here: (d) $_____

Write annual value of a client here (c) $_____

(d) $_____ / (c) $_____ =

New clients needed in the next 12 months (e) _____

STEP 3:

Write # of NEW clients onboarded (last 12 months) here: (f) _____

Write # of sales conversations (last 12 months) (g) _____

(f) _____ / (g) _____ =

Close ratio (h) _____

STEP 4:

Write # of NEW clients needed here: (e) _____

Write close ratio here: (h) _____

(e) _____ / (h) $_____ =

Number of SALES CONVERSATIONS to Make a Difference:

_____