



# CREATING YOUR 90-DAY PLAN

KEY STRATEGIES TO MEET YOUR GOALS AND  
EXCEED YOUR EXPECTATIONS

**salesup!**  
FUELLING YOUR GROWTH

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## PARTICIPANT WORKBOOK

IT IS IN YOUR POWER TO BRING YOUR MOST SUCCESSFUL IDEAS TO LIFE



**STEP 1 - CREATE YOUR LONG TERM GOALS (5-10 YEARS)**

**STEP 2 - CREATE YOUR ONE-YEAR GOALS**

**STEP 3 - KNOW YOUR NUMBERS**

- HISTORICAL
- FORECASTING

**STEP 4 - CREATE YOUR 90-DAY GOALS**

**STEP 5 – DEVELOP YOUR KEY STRATEGIES**

**STEP 6 – CREATE YOUR TASK DETAIL**

**STEP 7 – 90-DAY PLAN CHART**

**APPENDIX A- CREATING A REALISTIC SALES FORECAST**

# A note from Coach Jamie

**Welcome** to your 90-day planning workbook!

A MAJOR key to your success is and always will be, your ability to focus and execute on the “right” things. No doubt you are very busy. All business owners are “very busy”. What separates those who are achieving their goals from those who are not, are two things:

1. Knowing your goals
2. Having a well thought-out plan you can execute

This 90-day planning tool can be the method you use to keep yourself and your team on course. If this is the first time you have done an action plan; be OK if it is not a raging success the first time around. We are not saying it won't be but, like anything you do for the first time, there is a learning curve. The best planners are not born that way.

Before we begin, just one more thought. While we believe planning is crucial to success, it is no substitute for taking MASSIVE action. If I had to choose between planning and execution, I'll take execution any-day. So please invest the time in making a robust plan...and then get busy executing!

Have Fun.



**LET'S GET STARTED....**

# Step 1- Create your long-term goals

The first step in creating your plan is to get some long-term perspective. Before you can map out the short-term, you need to know where you want to end up in the long-term. If you have never done this before, carve out some serious time to think this over. Perhaps sitting somewhere inspirational, even with a glass of wine in your hand 😊

If you've already done plenty of long-term planning, you can move through this section a little faster, although it still pays to give it some thought. As our lives change, what is important can also change; and having a sense of what is important to you in the long-run is critical to success.

Allow yourself to dream here. It is not necessary to know how you are going to achieve these long term goals, the most important part is to start to get a sense of what you ideally want your life to look like. Use the following questions to guide you. Some of these questions are very deep and some not, but they are all intended to help you design your ideal life. Give yourself permission to be idealistic. Shut down the voice that tells you 'that is not practical'.

## LIFE DEFINING QUESTIONS

### Purpose finding questions

1. If success was guaranteed, what would I do?
2. If money and time were not limited, what would I do?
3. What am I really good at?
4. What am I passionate about?
5. What does a legacy look like by my definition?
6. What would I have to do to create a legacy?
7. What do I enjoy doing the most?
8. How can I create the most value for people doing what I enjoy the most and are the best at?
9. How much impact can I have on the world? How would I do it?
10. If there was one global problem I would like to solve, what would it be?
11. If my mission was to impact a billion people, how would I do it?

### Lifestyle defining questions

1. What would my ideal day look like?
2. What are the key activities I need to be engaged in to feel fulfilled?
3. Who are the people I like to be around to feel connected?

4. What would my ideal year look like
  - a. How many hours am I working
  - b. What do I do for vacation?
  - c. What do I do for enjoyment?
  - d. What do I do to fulfil my purpose?
5. Where do I want my income level to be?
6. What does my investment portfolio look like?
  - a. Stocks
  - b. Real Estate
  - c. Private company investments
  - d. Insurance and fixed income
7. What experiences am I having?
8. How would I define the person I want to be? What is my future identity?

With the notes you've written from the questions above; formulate some long term life goals. These don't have to be SMART (see [video](#) on SMART goals), but should be as specific as you can. You still have the freedom to change your mind on these in the future. The purpose of getting clear on these now is to give you a direction for the short term. It is very hard to make short term decisions on planning if you don't know where you want to be long term.

## LIFE GOALS

### DESCRIPTION OF GOAL

1	
2	
3	
4	

# BUSINESS DEFINING QUESTIONS

Now for the business: It is important to note business goals and personal goals can be closely linked. I.e. your passion and your fulfillment may come largely from your business activities. For some this will be true for others it may not be.

The key question is “for me to be able to enjoy my ideal life (as defined by the goals above), what does my business need to look like?”

- 1. What is my role in the business?
- 2. How many hours am I working?
- 3. What other key people will I need?
- 4. How big is the business?
- 5. How profitable will the business need to be?
- 6. What will operating Cash Flow need to be?
- 7. How will the business need to be positioned in the market? (Major player, minor player, international market, local etc.)
- 8. What will the succession/exit plan need to look like?

Looking at your answers to these questions, go ahead and establish some Long Term Business goals. As in the life goals, these are subject to change as you change, however the long term goals are necessary to give us short term direction.

# LONG-TERM BUSINESS GOALS

## DESCRIPTION OF GOAL

1
2
3
4

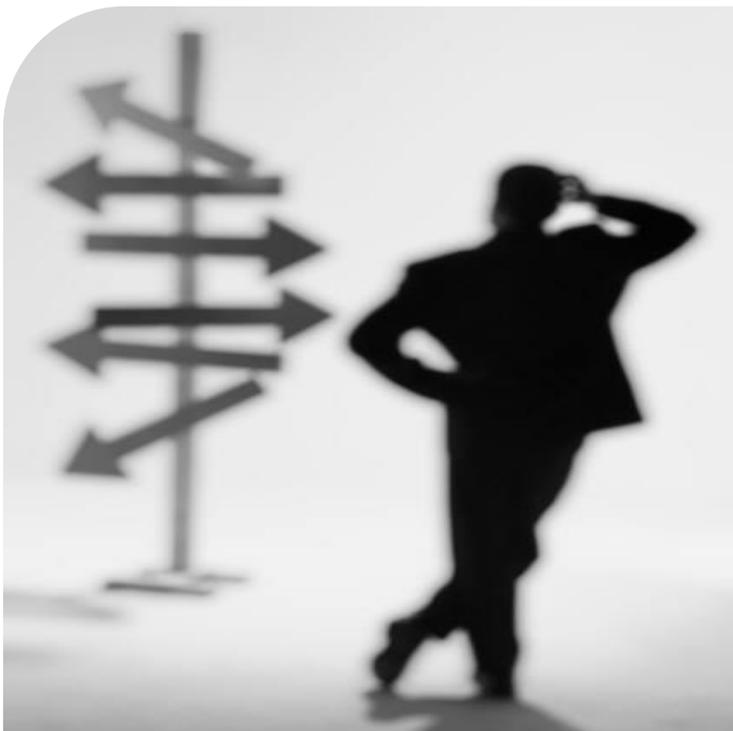
## Step 2 – Create your one-year goals

Now that you have a clearer idea on the long term (note: long-term does not HAVE to be 100% clear. If it is all the better, but it's not necessary to create your 90-day plan), it is the time to take a look at your one-year goals. These we do want to be 100% clear. By that we mean if you achieve your one-year goals, you will be on track and headed in the 'general' direction of your long-term goals.

Your one-year goals need to be SMART (see [video](#) on SMART goals)

To achieve my long-term goals, my one-year business goals need to be:

DESCRIPTION OF GOAL	DATE



Success Tip:

**“Begin  
with the  
end in  
mind”**

Steven Covey

(7 Habits of Highly Effective People)

# Step 3 – Know your numbers (historical)

<b>Income Statement / P&amp;L</b>	<b>Period 1</b>	<b>Period 2</b>	<b>Period 3</b>	<b>Period 4</b>
Length of Period	30/90/180/365 days	30/90/180/365 days	30/90/180/365 days	30/90/180/365 days
Fiscal Year	FY09	FY10	FY11	FY12
Sales				
Cost of Goods Sold				
<b>Gross Profit</b>	0	0	0	0
<b>Operating Expenses</b>				
Marketing and Sales				
General & Administrative				
Total Operating Expenses	0	0	0	0
<b>EBITDA</b>	0	0	0	0
<b>Other Expenses</b>				
Other Expenses / -Income				
Depreciation				
Amortization				
Interest Expense				
<b>Earnings Before Taxes</b>	0	0	0	0
<b>Taxes</b>				
Income Taxes				
<b>Net Income / Earnings</b>	0	0	0	0
<b>Balance Sheet</b>				
<b>Assets</b>				
Cash				
Receivables				
Inventory / Stock				
Other Current Assets				
Total Current Assets	0	0	0	0
Net Fixed Assets				
Other Assets				
<b>Total Assets</b>	0	0	0	0
<b>Liabilities</b>				
Payables				
Tax Payable				
Other Current Liabilities				
Total Current Liabilities	0	0	0	0
Long Term Liabilities				
Other Long Term Liabilities				
<b>Total Liabilities</b>	0	0	0	0
<b>Equity</b>				
Common Stock + Paid in Capital				
Dividends Paid/Declared				
Distribution Paid				
Net Income / Profit				
Retained Earnings				
<b>Total Equity</b>	0	0	0	0
<b>Total Equity + Total Liabilities</b>	0	0	0	0
<b>Extras</b>				
Number of Employees				
Total Payroll Amount				

## Step 3 – Know your numbers (forecasting)

Income Statement / P&L	Period 1	Period 2	Period 3	Period 4	
	Length of Period	90 Days	90 Days	90 Days	90 Days
	Fiscal Year	Q1 FY2014	Q2 FY2014	Q3 FY2014	Q4 FY2014
Sales					
Cost of Goods Sold					
<b>Gross Profit</b>	0	0	0	0	

Operating Expenses				
Marketing and Sales				
General & Administrative				
Total Operating Expenses	0	0	0	0
<b>EBITDA</b>	0	0	0	0

Other Expenses				
Other Expenses / -Income				
Depreciation				
Amortization				
Interest Expense				
<b>Earnings Before Taxes</b>	0	0	0	0

Taxes				
Income Taxes				
<b>Net Income / Earnings</b>	0	0	0	0

### Balance Sheet

Assets				
Cash				
Receivables				
Inventory / Stock				
Other Current Assets				
Total Current Assets	0	0	0	0
Net Fixed Assets				
Other Assets				
<b>Total Assets</b>	0	0	0	0

Liabilities				
Payables				
Tax Payable				
Other Current Liabilities				
Total Current Liabilities	0	0	0	0
Long Term Liabilities				
Other Long Term Liabilities				
<b>Total Liabilities</b>	0	0	0	0

Equity				
Comm on Stock + Paid in Capital				
Dividends Paid/Declared				
Distribution Paid				
Net Income / Profit				
Retained Earnings				
<b>Total Equity</b>	0	0	0	0

<b>Total Equity + Total Liabilities</b>	0	0	0	0
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Extras				
Number of Employees				
Total Payroll Amount				

## Step 4 – Create your 90-day goals

You guessed it; the next step is to break down your one-year goals into a 90-day timeframe. i.e. for you to achieve your one-year goals, what are the key milestones or what needs to be done in the next quarter to make that possible?

Note: If you are planning for an increase in sales that is different to your historical trend, be sure to start with planning this increase first (if this is an important goal for you).

See [Appendix A](#) on creating a realistic sales forecast.

90 Day Goals (EXAMPLE)	
Goal 1	Achieve \$30k net profit by end of 90-day period (ie: 30% increase over November Profit)
Goal 2 (maybe)	N/A
Goal 3 (rarely)	N/A

90 Day Goals	What are the goals you need to achieve?
Goal 1	
Goal 2 (maybe)	
Goal 3 (rarely)	



**Success Tip:**

**Remember to keep your goals S.M.A.R.T.**

# Step 5 – Key Strategies

This is where the rubber meets the road! Now that you have figured out your goal(s) for the next 90-days, you need to think about HOW you are going to achieve those goals. This is where you can sum up the strategies you will use to achieve those goals.

Strategy (EXAMPLE)	For Goal: (1,2,3)	Definition
A	1	Hire two new Sales Professionals by the end of February
B	1	Improve conversion rate to 40% by mid-March (excluding two new-hire results)

Strategy (A, B, C...)	For Goal: (1,2,3)	Definition

## Step 6 – Task Detail (Example) Strategy A

**Goal (What):** Achieve \$30K Net Profit by end of 90 day period (i.e. 30% increase over Nov. Results).

**Strategy to achieve goal (How):** Hire 2 new Sales Professionals by end of February.

**Measure of Strategy Success?** When each new hire can generate revenue of \$90k/month from January forward with a smaller contribution of \$40k/month in December.

Tasks - Steps Required (Do)	Date	Who	Cost	Hours
A1 – Develop Advertisement	Jan 15	TR	0	1
A2 – Set-up Hiring Program	Jan 16	TR & KR	0	4
A3 - Place advertisement in two different stream	Jan 19	KR	\$500	0.5
A4 – Review phone interviews and select top 5 candidates	Feb 2	TR & KR	0	2
A5 – Complete Group Interview	Feb 6	TR & KR	0	10
A6 – Complete the Flippen Indicator on top two candidates	Feb 11	TR & KR	\$600	8
A7 – Review findings with Coach & complete offer	Feb 13	TR & Coach	0	0.5 4/week
A8 – Complete Training program for new Sales Hire. Schedule for 1 <sup>st</sup> 2 weeks.	Feb 28	TR	0	3
A9 – Order new Desktop and cell	Jan 30	DF	\$1400	0.5
A10 – Establish new email and voicemail	Feb 1	DF	0	0.5
A11 – Introduce new professionals by email to Vendors and Partners	Mar 1	KR	0	1
A12 – Introduce new professionals in local publications	Mar 8	TR	\$250	1

## (Example) Strategy B

**Goal (What):** Achieve \$30K Net Profit by end of 90 day period (i.e. 30% increase over Nov. Results).

**Strategy to achieve goal (How):** To improve conversion rate to 40% by mid-March (excluding 2 new hire results).

**Measure of Strategy Success?** See movement from 20% to 40% from testing and measuring sales/marketing techniques.

Tasks - Steps Required (Do)	Date	Who	Cost	Hours
B1 – Test and Measure each sales script and marketing campaign for the four core product lines.	Feb 15	GS	0	Ongoing
B2 – Identify and evaluate the weakest product line and/or the weakest sales professional in “closing” skills/behaviors.	Jan 15	HS	0	2
B3 – Develop a “cross-sell” program by end of December and train staff.	Feb 1 - Mar 31	GS	0	3
B4 – Develop an “up-sell” program by end of December and train staff.	Feb 1 – Mar 31	GS	\$200	3
B5 – Develop Audio and Video Sales Training for three core product lines.	Feb 20	HS	\$1600	10
B6 – Investigate and learn more about NLP techniques.	Mar 1	HS & GS and Sales Team	\$300	8
B7 – Review current method of following up on quotes. Dedicate time in a default diary for each Sales Professional to take action twice a week.	Jan 15	Sales Team and HS	0	0.5 4/week
B8 – Develop a stronger USP and guarantee for the company. Will get ideas by seeking 10 references from current customer base to hear of what they consider our most important WOW factor.	Feb 15	GS, HS and Sales Team	0	3

# Task Detail – Strategy \_\_\_\_\_

Goal (What):

Strategy to achieve goal (How):

Measure of Strategy Success?

Tasks - Steps Required (Do)	Date	Who	Cost	Hours

# Task Detail – Strategy \_\_\_\_\_

**Goal (What):**

**Strategy to achieve goal (How):**

**Measure of Strategy Success?**

Tasks - Steps Required (Do)	Date	Who	Cost	Hours

# Task Detail – Strategy \_\_\_\_\_

Goal (What):

Strategy to achieve goal (How):

Measure of Strategy Success?

Tasks - Steps Required (Do)	Date	Who	Cost	Hours

# Task Detail – Strategy \_\_\_\_\_

Goal (What):

Strategy to achieve goal (How):

Measure of Strategy Success?

Tasks - Steps Required (Do)	Date	Who	Cost	Hours

# Task Detail – Strategy \_\_\_\_\_

Goal (What):

Strategy to achieve goal (How):

Measure of Strategy Success?

Tasks - Steps Required (Do)	Date	Who	Cost	Hours

# 90-day Plan for: Step 7 - 90-Day Plan Summary Sheet

90-day Goals:

<i>Critical Drivers</i>			
	Target	Actual	Req

<i>Strategies</i>
1)
2)
3)
4)

Wk 1 04-Jan	Wk 2 11-Jan	Wk 3 18-Jan	Wk 4 25-Jan	Wk 5 01-Feb	Wk 6 08-Feb	Wk 7 15-Feb	Wk 8 22-Feb	Wk 9 29-Feb	Wk 10 07-Mar	Wk 11 14-Mar	Wk 12 21-Mar	Wk 13 28-Mar

<i>Longer Term Goals</i>	
Goal	Timeframe

<i>Growing your Knowledge / Habits</i>

## 90-day Plan for

## ABC Company. July - Sept 2015

### 90-day Goals

1) A fully implemented marketing calendar

2) Hire 2 new sales people

3) Increase GM to 36%

Strategies	WHO	4-Jul	11-Jul	18-Jul	25-Jul	1-Aug	8-Aug	15-Aug	22-Aug	29-Aug	5-Sep	12-Sep	19-Sep	26-Sep
<i>1) A fully implemented marketing calendar</i>														
Build out our top 5 initial marketing strategies	BM	█												
Allocate responsibilities	BM			█										
Test & Measure	TDB				█	█	█	█	█	█	█	█	█	█
Add 2-3 more strategies or refine existing	BM											█	█	█
<i>2) Hire 2 new sales people</i>														
Write out job descriptions & Ads	ST	█												
Set up hiring process	ST		█											
Execute Ads & Process	ST			█	█	█	█	█	█	█				
Onboard	ST									█	█	█	█	█
<i>3) Increase GM to 36%</i>														
Work with Bruce & Sue on sales skills	ST			█	█	█	█	█	█	█	█			
Review pricing and increase on top 10 items	ST				█	█								
Change sales comp. for higher margins	ST					█	█	█	█					
Weekly sales meetings to review results	ST				█	█	█	█	█	█	█	█	█	█

# Appendix A

## Setting a Realistic Sales Forecast

Consider these key questions when setting a sales forecast to ensure that it is both realistic and achievable:

1. If I am planning an increase my sales, what are my assumptions compared to same time last year
2. How much revenue could I expect if I was to do nothing pro-active? (we call this BAU – Business As Usual)
3. What is my Revenue GAP?  $RGAP = \text{Forecasted Sales} - \text{BAU Sales}$
4. How am I going to fill my RGAP? Existing Customer sales or New Customer Sales. Allocate a % to each. I.e. 70% Existing Customer Sales & 30% New Customer sales
5. To achieve New Customer Sales, use the following formula:

$$\text{New Customer Sales} = \text{New Leads} \times \text{Conversion Rate} \times \text{Spend per Customer}$$

Plug in your conversion rate and spend per customer to work out the number of leads you'll need to generate. This will give you a guide on your marketing plan:

$$\text{New Leads Required} = \text{New Customer Sales} / \text{Spend per Customer} / \text{Conversion rate}$$

For example:

$$\frac{(100,000 / \$4,000)}{25\%} = 100 \text{ new leads}$$

6. To plan for Existing Customer sales take a look at your marketing plan and have specific strategies that make sense to achieve that goal.