

Coaching & Introduction Manual for

Proactive Sales Management Teams



***THE DAILY
GAMEPLAN***[®]

SALES PLANNING & FOLLOW-UP SYSTEMS

Why Daily Gameplan Works

>> GETTING STARTED

For decades business to consumer companies have tried many different systems when it comes to customer follow-up, sales planning, and goal setting. And for years, the lack of integration, the complexity, and in many cases, the isolation of the salespeople from the systems, has kept dealerships from seeing their true potential — a positive and proactive sales team focused on results.

Daily Gameplan is first and foremost a system that promotes the communication of salespeople and managers for one primary goal — *more sales!* The specialized monthly planners are crucial to those results. Simply put, Daily Gameplan keeps everything your salespeople need to focus on at their, and ultimately your, fingertips.



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The Bottom Line...

**An average retailers list
of expenses directly related
to their sales department.**

Monthly Company Investment (per Salesperson)

Newspaper Ads	\$910
Television Ads	\$487
Radio Ads	\$539
Direct Mail	\$277
Compensation	\$3,680
Support Staff	\$2,484
Rent/Overhead	\$500
<hr/>	
Total Monthly Investment	\$8,877

How does your store stack up?

**At \$14.90 per Salesperson,
per month, our goal is to be
your best investment ever!**



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Goal Setting 101

The Daily Gameplan is a sales tool that allows Salespeople and their Managers to work closer together to achieve more.

What is your store truly capable of selling?

Most successful sales teams have three things in common:

- 1 They consistently push themselves out of their comfort zones.
- 2 They write down their goals, and then break their goals into smaller, manageable daily or monthly activities.
- 3 They consistently track their progress and immediately make the adjustments necessary to hit their goals.

BEFORE



Old School push back!

AFTER



Making deals happen!



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A.I.M. to Succeed

There are three key components to successfully transforming your salespeople into a sales team focused on their goals

Accountability

By inspecting your salesperson's process and follow-up routine, you can consistently mentor them towards success.

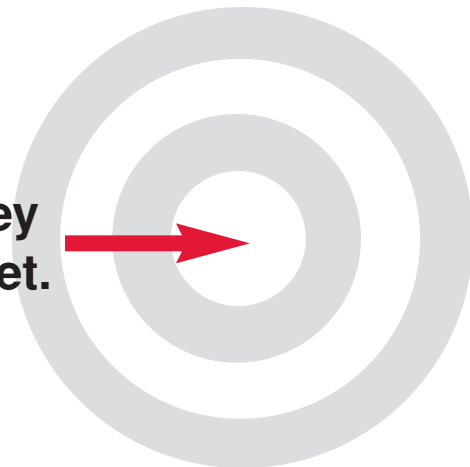
Involvement

Prioritize your day to spend as much time as possible one-on-one with your sales team.

Motivation

Proactive Managers motivate by finding each team member's "hot button" and catering their mentoring style to reflect their team's needs.

Everyone wins when they
A.I.M. for the same target.



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Learning Center

>> GETTING STARTED

At Daily Gameplan we understand that the best follow-up system available is the one your team will actually use. That's why we are always happy to answer any questions or cover any component in detail on our toll free help line at no additional cost to you.



Office hours:

7:30am to 5pm Mountain Standard Time
(2 hours behind Eastern Standard Time)
1.888.330.6006

Those who wish to learn online or have a question after hours are welcome to visit our learning center at www.dailygameplan.com




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Salesperson Planner Client Files

Each Daily Gameplan contains 112 **Client Files**. The object of the Client Files is to give your salespeople a personal archive of each client they have made contact with this month. Having all the client information in one place insures a productive one-on-one session and helps your salespeople properly follow-up with working and sold clients.

CLIENT #25 <input checked="" type="checkbox"/> Mr. <input type="checkbox"/> Mrs.	Client Information Name(s) <u>Scott Bergeron</u>		Product Description <u>Panasonic Plasma TV 42"</u>		MONTHLY STATISTICS SOURCE <input checked="" type="checkbox"/> Walk-in <input type="checkbox"/> Internet <input type="checkbox"/> Phone-in <input type="checkbox"/> TV <input type="checkbox"/> Be Back <input type="checkbox"/> Radio <input type="checkbox"/> Repeat/Referral <input type="checkbox"/> Newspaper <input type="checkbox"/> Appointment <input type="checkbox"/> Other ACTION STEPS <input checked="" type="checkbox"/> Demo <input checked="" type="checkbox"/> Mgr Intro <input checked="" type="checkbox"/> Write-up <input checked="" type="checkbox"/> Sent Card	
	Street Address <u>231 Violet Street</u>		Brand <u>Nautica</u> Description <u>Ottoman</u> Size <u>22" x 25"</u>			
	Date <u>1/2</u>	City <u>Golden</u> State <u>CO</u> Zip <u>80401</u>		Brand <u>Nautica</u> Description <u>Sectional</u> Size <u>101" x 31"</u>		
		Best Phone #1 <u>303-972-9444</u>		Brand <u>Broyhill</u> Description <u>Cabinet</u> Size <u>107" x 80" x 20"</u>		
		Best Phone #2 <u>303-872-1154</u>		Additional Products / Comments <u>Bringing back wife (Tricia) Saturday a.m. for final decision.</u>		
		Email #1 <u>(scott@dailygameplan.com)</u>		SOLD  \$1102		
		Email #2 <u>N/A</u>		\$1102 MTD		

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Power Tips

- 1 Your Salesman's follow-up records!
- 2 Easy to track commissions & deliveries!
- 3 The more detail, the easier to recall each deal!



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One-on-One Sessions at Least Twice Per Week

Meet with your salespeople **One-on-One** no less than twice per week. This should be the top priority for hitting your forecasts and objectives.

The goal of your One-on-One sessions should be to find as many unsold clients who are just one or two steps away from buying. Together, build a plan to set and confirm an appointment with the client.

Never assume that your salespeople have exhausted every possibility if they are working on their own; they don't have all the answers. Every sales manager brings a wealth of experience, ideas, and options to every one-on-one meeting.



▶▶ DAILY GAMEPLAN



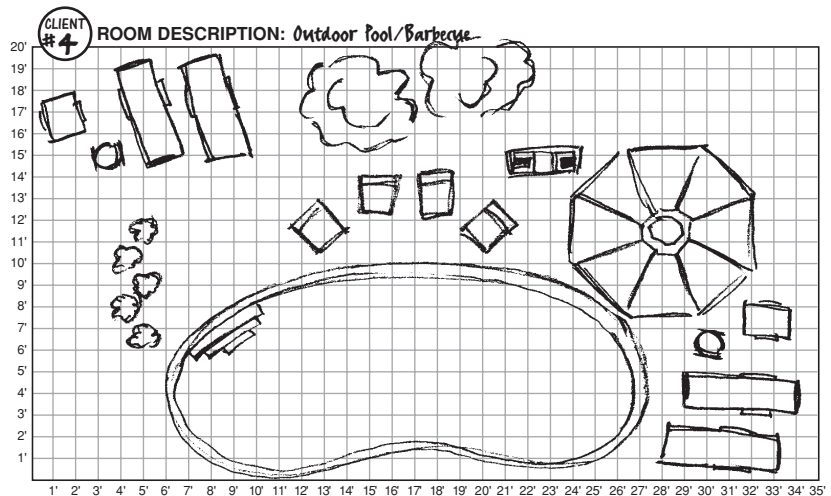
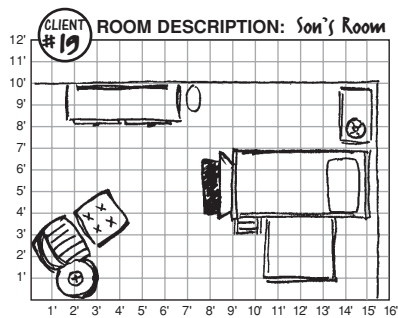
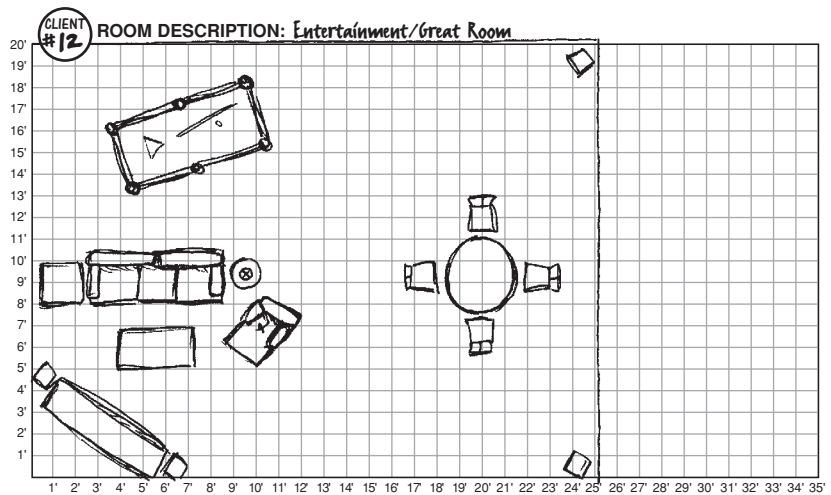
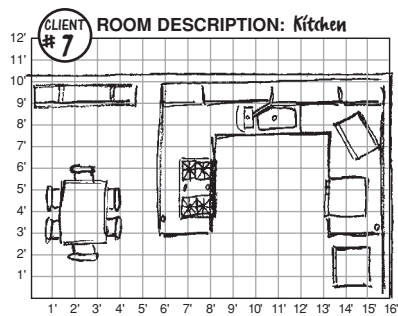
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Salesperson Planner Plan-A-Room

The **Plan-A-Room** section in Daily Gameplan is designed to help your sales team gain insight into their clients needs and wants. Train your sales team to involve their clients and hand sketch the room or area that clients are looking to upgrade or design.

Getting involved in the design process will help build rapport, show professionalism, and minimize miscommunications.



Plan-A-Room starts at the second tab of the planner



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Salesperson Planner Left Daily Page

The **left daily page** is to help your sales team plan their work. There are quick glance calendars, an inspirational quote and schedulers for today's appointments and phone/floor traffic.

31 SATURDAY MARCH 2007

Weather Notes: _____
Business Effects: _____

WHAT'S HAPPENING IN MARCH?
4 weekends (3 Fridays, 4 Saturdays & 4 Sundays)
17 St. Patrick's Day

*"No one can possibly achieve any real and lasting success or 'get rich' in business by being a conformist."
-J. Paul Getty*

PHONE-IN CLIENTS		Prospect File Page # or Phone #	SCHEDULED APPTS.
Name	Product Wants/Needs		
1	Tommy Jacobs	232-8181 Camry	7 AM
	appointment tonight, 6:00		8
2	Kim Howledge	2nd car used for college son	9
	appointment Friday, 2:00		10
	Record full details in prospect files or monthly scoreboard!		11
WALK-IN CLIENTS		Prospect File Page # or Phone #	12 PM
Name	Product Wants/Needs		1
1	Jim & Teresa Walker	Accord	2
2	Dan & Grace Weltley & Dan's brother	Jason - Cobalt	3
	Record full details in prospect files or monthly scoreboard!		4
CLIENT FOLLOW-UPS NEEDED		Prospect File Page # or Phone #	5
Name	Product Wants/Needs		6
1	John Smith	07 Explorer	7
2	Chris Niera	CrewMax - Red	8
3	Katie & Rick Riley	Used Civic	9
4	Ben Lachance	03 Camry - Newspaper Ad	
	Search your prospect files for hot prospects!		

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Power Tips

1

Used for client contacts and today's appointments!

2

Use Prospect or Client Files for in depth customer notes!

3

Client Follow-ups taken from working client files!

DAILY GAMEPLAN



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Salesperson Planner Right Daily Page

The **left daily page** is to help your sales team plan their work. There are quick glance calendars, an inspirational quote and schedulers for today's appointments and phone/floor traffic.

- ★ INCENTIVES
- ★ CLIENT ISSUES
- ★ TODAY'S PRIORITIES

THE DAILY GAMEPLAN

- ★ DELIVERIES
- ★ INVENTORIES
- ★ PRODUCT TRAINING

- Check with Jake about switching shifts - Truck Training Seminar
- Send thank you cards to yesterday's deliveries
- Follow up calls to Hot Prospects
- Get title signed from Elaine Joseph - finance needs ASAP!
- Send next week's birthday cards - Run list on Daily Gameplan Online
- Update time sheet
- 30 minutes practice walk-around - Envoy
- Walk through yesterday's used trade-ins

DAILY RESULTS

CLIENT NAME	UNIT OR STOCK #	GROSS	UNIT COUNT
Moore	03 Jeep	1950	/
Scott	Civic Hybrid split w/Vince Armijo	1680	/
			/
			/

*Record full details in the Client Files.

MONTHLY RESULTS

	UNITS	SALES GROSS
MY MONTHLY GOALS:	13	15000
SOLD SO FAR (-)	*1½	* 3630
SALES STILL NEEDED (-)	11½	11370
WORKING DAYS LEFT (+)	23	23
SALES NEEDED PER DAY (=)	.5	495

*Record full details in the Sales & Income Graphs.

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Power Tips

- 1
 Today's To Do List!
- 2
 Use Client Files for in-depth customer notes!
- 3
 Inspect your team periodically to insure they are updating the clipboards!

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Salesperson Planner Beginning of the Month

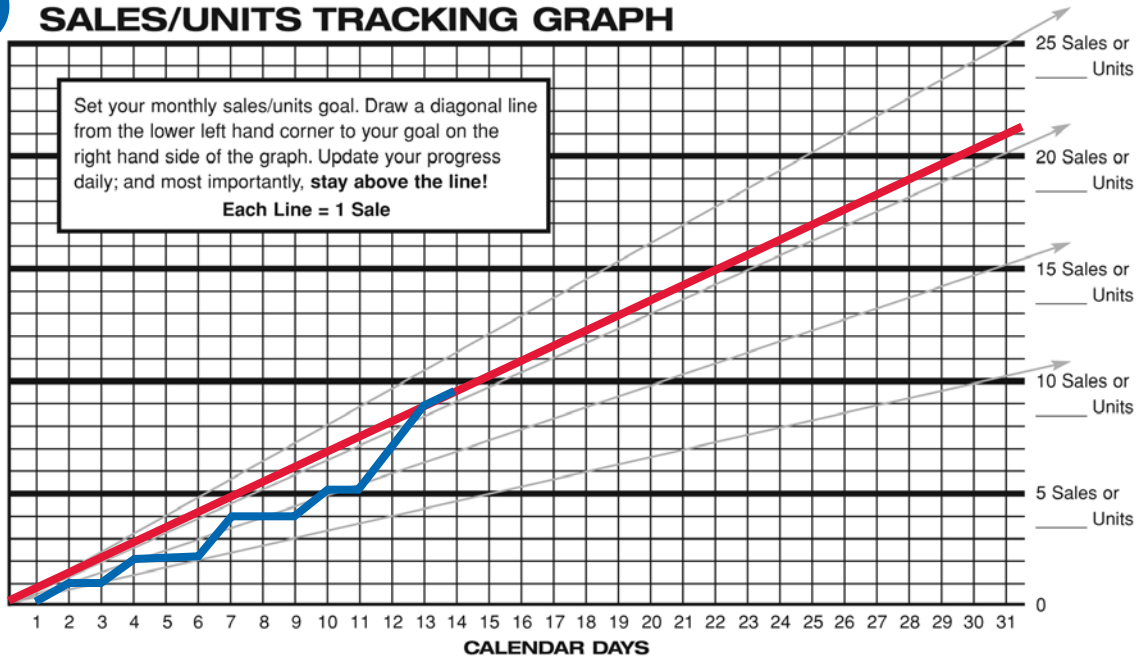
Two exercises your sales team can do at the beginning of the month to stay focused on their goals & objectives

1 Sample: $\$5000 \div 280 = 18 \div 29\% = 62$

\$5000	÷	280	=	18	÷	29%	=	62
Forecast Income (Your Goal)		Income Per Sale Average (Box 5B Below)		Number of Sales Needed to Reach Forecast Income		Closing Ratio (from Box 4B on next page)		Prospect Contacts Needed

▲ Monthly Activities Forecast – Located on the Client Files tab

2 SALES/UNITS TRACKING GRAPH



▲ Daily Sales Tracking Graph – Located on the Daily Pages tab



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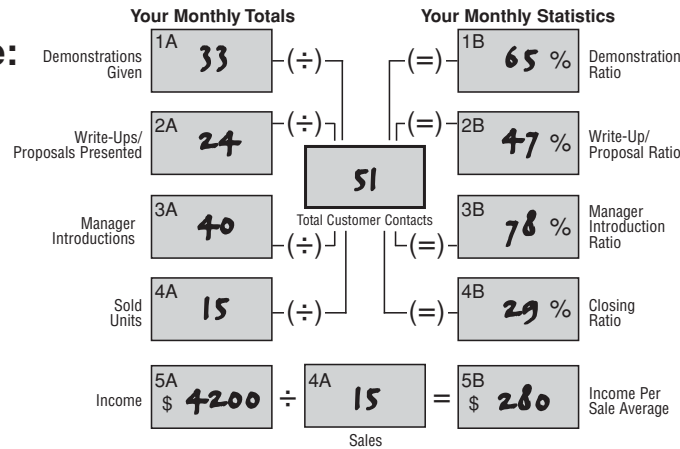
Salesperson Planner After Closing the Month

Three exercises your sales team can do at the end of the month to analyze their strengths, areas of improvement, and annual sales track.

1

Sample:

Inspect What You Expect!



▲ Located on tab one of the Daily Gameplan

2

2007 Personal Sales Planning — Forecasted vs. Actual

	Customer Opportunities ups		Sales Units gross if applicable		Earned Income total personal income		\$ Per Sale earned income ÷ sales	
	Forecasted	Actual	Forecasted	Actual	Forecasted	Actual	Forecasted	Actual
January 2007	60	65	12	11	\$3600	\$3850	\$300	\$350
Year to Date	60	65	12	11	\$3600	\$3850	\$300	\$350
February 2007	54	58	11	12	\$3300	\$3600	\$300	\$300
Year to Date	114	123	23	23	\$6900	\$7450	\$300	\$325
March 2007								
Year to Date								

▲ Located on the last page of the Daily Gameplan

3

2007 Reality Check — How are you tracking?

Sales $\frac{23}{\text{YTD Sales}} \div \frac{2}{\text{Completed Months}} \times 12 \text{ months} = 138$ (End of Year Sales Projection)

Earnings $\frac{\$7,450}{\text{YTD Earnings}} \div \frac{2}{\text{Completed Months}} \times 12 \text{ months} = 44,700$ (End of Year Earnings Projection)

Areas to improve in order to reach my goals!

1. Demo 75% of my prospects.
2. Mail newsletter 3 times this year.
3. Use my sales manager for ideas.
4. Improve cross sales (used) to 30%.
5. Walk trade-ins every morning.
6. Enter prospects in Gameplan — no lost ups!

▲ Located on the last page of the Daily Gameplan



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Contact Us

If you have any questions regarding **Daily Gameplan**, your initial roll-out of the system, or any of the components we've covered here, we are always available to answer them for you One-on-One.

No annoying phone systems or impersonal call centers to deal with. We'll handle all of your questions or concerns professionally and immediately.

Office hours are 7:30am to 5:00pm Mountain Standard Time.
(2 hours behind Eastern Standard Time).

Our goal is to make your experience with Daily Gameplan the best of any service provider.

Daily Gameplan, Inc.

**231 Violet St. #100
Golden, CO 80401**

OUR WEBSITES

**www.dailygameplan.com
www.dailygameplanonline.com
www.dailygameplannews.com**



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