

# Sales activity planning calculator

Joel Ward | Cable's Roofing | Original workbook exhibit

A compact planning tool linking activity, conversion assumptions, average sale, annual targets, and working time.

Source: Sales Rep Metric Calculator.xlsx

## Worksheet coverage

Sheet1: complete populated view

Static view of the original worksheet. Inputs, assumptions, and saved results retain their original layout.

All displayed columns fit on this page

SALES REP METRIC CALCULATOR

ACTUAL:

| Select Period            |                                     | Doors Knocked       | Leads Generated | Qualified Leads | Sales per period | INFO FROM ACCULYNX  |                     |
|--------------------------|-------------------------------------|---------------------|-----------------|-----------------|------------------|---------------------|---------------------|
| Weekly                   | Monthly                             | Acculynx Milestone: | >>>Lead         | >>>Prospect     | >>>Approved      | Average Sale Price  | Annual Sales Volume |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | 300                 | 33.3            | 16.7            | 2.5              | \$10,000            | \$300,000           |
| Working Per Year         |                                     | % of Doors Knocked: | 11.1%           | 5.6%            | 0.8%             | Annual # of Sales:  | 30                  |
| 52                       | 12                                  |                     | % of Leads:     | 50.0%           | 7.5%             | Annual # Prospects: | 200                 |
|                          |                                     |                     |                 | % of Qualified: | 15.0%            | Annual # Leads:     | 400                 |
| Time Off per YR          |                                     |                     |                 |                 |                  |                     |                     |
| Weeks                    | Months                              |                     |                 |                 |                  |                     |                     |
| 0                        | 0                                   |                     |                 |                 |                  |                     |                     |

ASSUMPTION:

| Doors Knocked       | Leads Generated | Qualified Leads | Sales per period |                    |                     |
|---------------------|-----------------|-----------------|------------------|--------------------|---------------------|
| Acculynx Milestone: | >>>Lead         | >>>Prospect     | >>>Approved      | Average Sale Price | Annual Sales Volume |
| 500.5               | 55.6            | 27.8            | 5.6              | \$15,000           | \$1,000,000         |
| % of Doors Knocked: | 11.1%           | 9.3%            | 1.9%             |                    |                     |
|                     | 20              | 50.0%           | 16.7%            |                    |                     |
|                     |                 | % of Qualified: | 20.0%            |                    |                     |