



**THE  
ENTREPRENEUR'S  
DAILY SALES  
PLANNER**

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# From the desk of Dana

Congratulations, I am very excited you downloaded the Entrepreneur's Daily Sales Planner. When you wake-up every morning with the mindset to be laser focus on your client's needs, and understand that your products and services are meant to solve their problems, getting the sales will not be a burdensome chore but a reward.

Also, just hoping your business will grow is not the answer. You must be intentional, systematic, strategic, and relentless. If you are serious about growing your business, complete the daily planner in the morning and let nothing derail you from being successful.

Remember, you are operating a business and not a hobby!

*Dana*



## Start with the end in mind

### December 31, 2017 completed Milestones

Identify **5 Accomplishments** you want your business to complete by year-end. The accomplishments should tie to your strategic plan for the current year.

- 1). \_\_\_\_\_  
\_\_\_\_\_
- 2). \_\_\_\_\_  
\_\_\_\_\_
- 3). \_\_\_\_\_  
\_\_\_\_\_
- 4). \_\_\_\_\_  
\_\_\_\_\_
- 5). \_\_\_\_\_  
\_\_\_\_\_



Date: \_\_\_\_\_

When you know your day rate, you are less inclined to work on menial tasks. So, let's get your day rate. Let's say you want to earn \$100,000 in 2017 at a minimum, what would be your day rate?  $\{ \$100,000 / 260 \text{ weekdays} = \text{\$384.62-day rate}$  or  $\$100,000 / 130 \text{ weekdays} = \text{\$769.23-day rate.}$  When you know your day rate, you are very careful not to waste the day on "non-income generating activities".

### Daily email and/or calls

Review your daily tasks first thing in the morning. Don't be afraid to delegate non-essential tasks to others.

Follow-up on e-mails and calls – Time Allocated \_\_\_\_\_

### Daily calendar

Review your committed appointments for today and prepare accordingly.

Set-up new appointments for next at least 1 week out – Time Allocated \_\_\_\_\_

## SALES

Target Number: \_\_\_\_\_ Target Sales: \$ \_\_\_\_\_

Pitch to existing Clients: # \_\_\_\_\_ New Clients: # \_\_\_\_\_

Referral Network: # \_\_\_\_\_

**Strategy Question:**



## AD COSTS

**Strategy Question:** What are you willing to spend to achieve your Sales target?

**Strategy Question:** What resources (e.g. staff) do you need to accomplish your sales target?

Direct Mail:\$ \_\_\_\_\_

Lead List:\$ \_\_\_\_\_

Google Ads:\$ \_\_\_\_\_

Facebook Ads\$ \_\_\_\_\_



## PROMOTION

**Strategy Question:** What keywords would your ideal client use to search for your product/services?

**Point:** Pick a social media outlet where your target market frequents. Using all social media outlets below may not be the best use of your resources.

Facebook

Instagram

Twitter

LinkedIn

Google+

Vine

**Point:** What information resource below, would your ideal client use to solve their problem?

Blog

Youtube

Forums

Podcast

**Comments:**

**Lessons Learned:** Measure your effectiveness, if a strategy is unprofitable, then make the necessary adjustments for the next day.



## SALES ANALYSIS

**What was effective and non-effective with your sales strategy?**

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**How many people did you add to your list or funnel?**

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**How will you engage them over the next 15 days?**

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**How much cash from today's sales did you reinvest into the business?**



## Marketing Mix Plan

The marketing mix refers to the set of actions, or tactics, that a company uses to promote its brand or product in the market.

Target Market: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Yearly Marketing Budget: \_\_\_\_\_

Product (or services): \_\_\_\_\_  
\_\_\_\_\_

Industry Trends: \_\_\_\_\_  
\_\_\_\_\_

Price: \_\_\_\_\_  
\_\_\_\_\_

Goals: (specific and measurable)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Placement: \_\_\_\_\_  
\_\_\_\_\_

Promotion: \_\_\_\_\_  
\_\_\_\_\_

Strategies:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Profit: \_\_\_\_\_  
\_\_\_\_\_

### Social Media Strategies:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### SWOT ANALYSIS

Strengths:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Weaknesses:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Threats:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Opportunities:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### 180-Day Plan

January: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

February: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

March: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

April: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

May: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

June: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

