



# **Sales Goals Planning Workbook**

**Tips for Setting and Achieving  
Sales Goals In 2022**



# Charlie Anderson

## Shift Thinking **SALES COACH**

**Charlie Anderson** is the founder and owner of Selling Skills INSTITUTE, a transformational (able to influence shifts in *thinking* and *behavior*) sales training and coaching business. It specializes in delivering sales programs and courses that shift how sellers think about selling, inspire confidence, and elevate their sales game.

For over 25 years, Charlie has worked with thousands of sales professionals, business owners, and entrepreneurs. But, Charlie recently said, “I wouldn’t be where I am today without the trust and loyalty of my amazing clients.”

Charlie’s professional mission is to help *humanize* (put human beings first) the sales profession by *flipping the script* on conventional, product-pushing selling to an authentic, human-to-human experience.

Today, Charlie is known as the “Shift Thinking” Sales Coach. He is the visionary behind Shift Thinking, a transformational sales training and coaching method and bestselling book. The Shift Thinking method outlines the essential steps sellers need to embrace to *Master The Thinking Game Of Selling*, and:

- Breakthrough perceived limits
- Elevate their sales game
- Grow their confidence & income
- Leapfrog from where they’re at to where they want to be

Charlie is also the architect of The *Ultimate Sales Prospecting Playbook and Human Dynamic Selling*.

The Ultimate Sales Prospecting Playbook is today’s seller’s roadmap for prospecting, appointment-setting, and new business development success. The playbook outlines best practices, key strategies, and play-by-play processes to ensure sellers perform at their highest level in today’s fast-paced, digitally-driven business environment.

Human Dynamic Selling is a new selling model that humanizes the buying and selling experience. By following the fundamental principles of Human Dynamic Selling, businesses and sellers can differentiate themselves in today’s virtual “sea of sameness,” create a competitive advantage and maintain a steady flow of closed deals at higher margins.

# Make 2022 Your Greatest Year Ever!

There's no denying it, we live and work in a world of unpredictability.

We see it from afar when we turn on the news every day, but we feel it up front and personal as every quarter comes to a close, and we think about how we're going to reach our sales targets.

Deals fall through, and unseen events disrupt the marketplace and customers replace vendors and suppliers.

**We can't control everything, but we can create a structured plan that will help us WIN more often.**

A structured plan helps us work towards achieving results more predictably and confidently.

You don't know what's waiting for you in 2022. But you do know that your sales targets will be there, waiting to be met.

**You have two choices:**

1. Head into the New Year blindly and hope for the best, or you can...
2. Take action now to identify what you need to do on a daily, weekly, and monthly basis to exceed your 2022 goals.

**IT'S YOUR CHOICE. WHICH WILL YOU CHOOSE?**

# Selling Skills INSTITUTE

Helping To Humanize The Sales Profession ®

*"Shifting the way to think about selling"*



### **Reflect on 2021**

**Identify you five most rewarding sales accomplishments in 2021.**

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

**Describe why they were rewarding and what you learned from each accomplishment.**

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# Overcome Challenges!



List five of the most difficult sales challenges you encountered in 2021.  
Describe how you were able to overcome them.

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

If you're not constantly auditing yourself, your habits, your strategies and the way you manage your behaviors, **YOU'LL NEVER PERFORM AT THE TOP OF YOUR GAME.**



# Roger Bannister

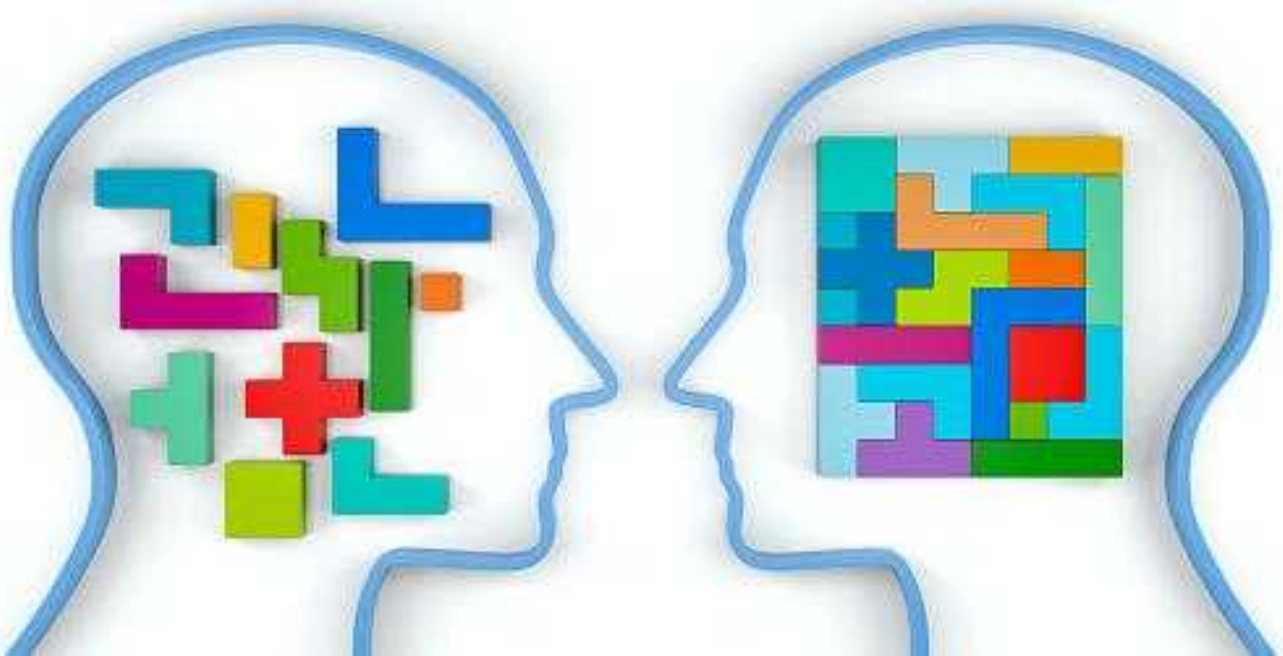


**Roger Bannister was the first man to run a mile in under four minutes.** Up until he did it in 1954, most people thought the four-minute mark was impossible to break. They thought the human body couldn't physically go that fast – that it would collapse under the pressure—**until Bannister did it.**

**Write down five reasons people believe that things are impossible:**

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

“There is no prize in sales for second place. It’s a win or nothing game. The top performers know this and strive for—they fight for—that winning edge.”  
Jeffrey Gitomer



**The most successful people all have one thing in common,  
they THINK DIFFERENTLY from everyone else.**

- There is a direct connection between your thinking and your level of success
- Thinking is a discipline. If you want to be better at it, you've got to work at it constantly
- If you keep thinking the same thoughts, you will continue to get the same results
- As long as you think something is impossible, you will never find out what is possible
- Our thoughts direct our actions which lead to our outcomes
- New results come from new behaviors which are driven by new thinking
- Your sales success is contingent upon your thoughts, not the thoughts of prospects or clients
- The only person who can control your thinking is you
- Unleash your greatest potential by shifting your thinking and changing your daily habits

**Briefly describe how self-limiting (something that limits oneself) thinking  
can negatively impact sales results.**

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# THINK ABOUT THINGS DIFFERENTLY

**A** shift in THINKING is an essential yet rarely addressed piece of the goal-setting puzzle. If you keep thinking the same thoughts, you will keep getting the same results. I believe the definition of insanity is “Thinking the same thoughts over and over again and expecting different results.”

If you want to achieve your goals, you must THINK DIFFERENTLY and DO THINGS DIFFERENTLY. This requires a shift in your thinking and changing unproductive behavior that derails your results.

## ***Exercise***

**Identify THOUGHTS you'll need to shift in order to achieve your 2022 goals.**

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**Your THOUGHTS are the single most important factor in determining your SUCCESS OR FAILURE.**

#### Thinking For Success

You are today where your thoughts have brought you. You will be tomorrow where your thoughts take you.

Successful people think differently than unsuccessful people.

Nurture great thoughts for you will never go higher than your thoughts.

Your world is a result of your thinking. It cannot be changed without first shifting your thinking.

Your thinking, more than anything else, shapes the way you live.

It is true that if you shift your thinking, you can change your life.

Whether you think you can, or you think you can't, you're right.

The problem with popular thinking is that it doesn't require you to think at all.

Stop thinking that something which has never been done before probably cannot be done at all.

The greatest enemy to tomorrow's success is relying on outdated thoughts from yesterday.

Reject common thinking if you want to accomplish uncommon results.

Don't think about what might go wrong. Think about what could go right.

Once you replace negative thoughts with positive thoughts, you'll produce positive results.

**Maybe today is a good time to stop and assess just how good a thinker you are.**



**There's nothing more powerful on the planet than your THOUGHTS.  
The biggest obstacle you'll ever have to overcome is in your mind.**

Self-limiting Thinking	New Thinking
Make a list of self-limiting thoughts that hold you back from moving to the next level.	Write down new, productive thoughts
I don't have time to prospect.	I'm extremely busy, but I will find time to invest three hours a week to prospect for new business opportunities.



# CHANGE YOUR THOUGHTS AND YOU CHANGE YOUR WORLD.

## **POSITIVE AFFIRMATIONS: Life-changing thoughts to practice daily.**

Many people swear by the power of affirmations to create positive changes in their lives and careers. However, we cannot rely purely on thoughts, we must translate thoughts into actions in order to manifest our intentions.

***Neuroscience now proves that our thoughts can change the structure and function of our brains.***

- I awaken in the morning feeling happy and enthusiastic about life
- By allowing myself to be happy, I inspire others to be happy as well
- I find joy and pleasure in the most simple things in life
- I expect to be successful in all of my endeavors. Success is my natural mindset
- I look for solutions to my challenges and roadblocks and move past them quickly
- Mistakes and setbacks are stepping stones to my success because I learn from them
- I see fear as the fuel for my success and take bold action despite my fears
- Today I am successful. Tomorrow I will be successful. Every day I am successful
- I learn from the past. I live in the present and am confident of the future
- I am responsible, self-reliant, creative, and persistent in whatever I do
- Self-confidence is what I thrive on. I believe nothing is impossible and life is great
- I have integrity. I am reliable. I do what I say I'll do
- I am grounded in the experience of the present moment
- I am free of anxiety, and a calm inner peace fills my mind and body



**What changes are you making to improve yourself in 2022?**

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

**What habits are you getting rid of?**

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

**What are you going to be more intentional about in 2022?**

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





Keep Winning!

Motivation is what gets you started,  
**GOOD THINKING and GOOD HABITS** keep you **WINNING**.

Finding What Matters	Your Responses
What personal and professional routines help you stay focused, productive, and effective?	
What habits have you started and discarded, and what habits have you kept that always seem to work?	
What recurring thoughts do you purposefully say to yourself to help you perform at your best?	
If you had to select three things that make you successful, what would those three things be?	
What do you tell yourself when you experience self-doubt or disappointment?	
What makes you confident, and how do you “turn on” confidence when you need it?	
What practices keep you happy and healthy as you pursue your goals?	
Which things are you clear about that help you perform successfully?	
What else do you know about yourself—beyond your values and strengths—that make you successful?	





## 2022 Smart Goalsetting Ideas


<b>SPECIFIC</b>	What exactly is it that you want to achieve?	
<b>MEASURABLE</b>	How will you measure and track the progress of the goal?	
<b>ATTAINABLE</b>	Is the goal actually attainable in the given timeframe?	
<b>RELEVANT</b>	Is the goal something that you really want to achieve? How will it directly benefit you?	
<b>TIME BOUND</b>	When do you want / need to achieve the goal?	



**STRENGTHS and WEAKNESSES**

The strengths you have now are probably insufficient to get you to the next level.  
So, you'll probably have to work on your weaknesses and **DEVELOP NEW STRENGTHS**.

Weaknesses You'll Work On	New Strengths You'll Develop



Don't ever let good  
enough be good enough.

Bill Parcells

quoteandyou

### **Sometimes Good Enough Is NOT GOOD ENOUGH!**

**Write down four things you would like to become extraordinary at doing.  
Describe how you plan on getting there?**

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**Briefly explain why you picked these four things.**

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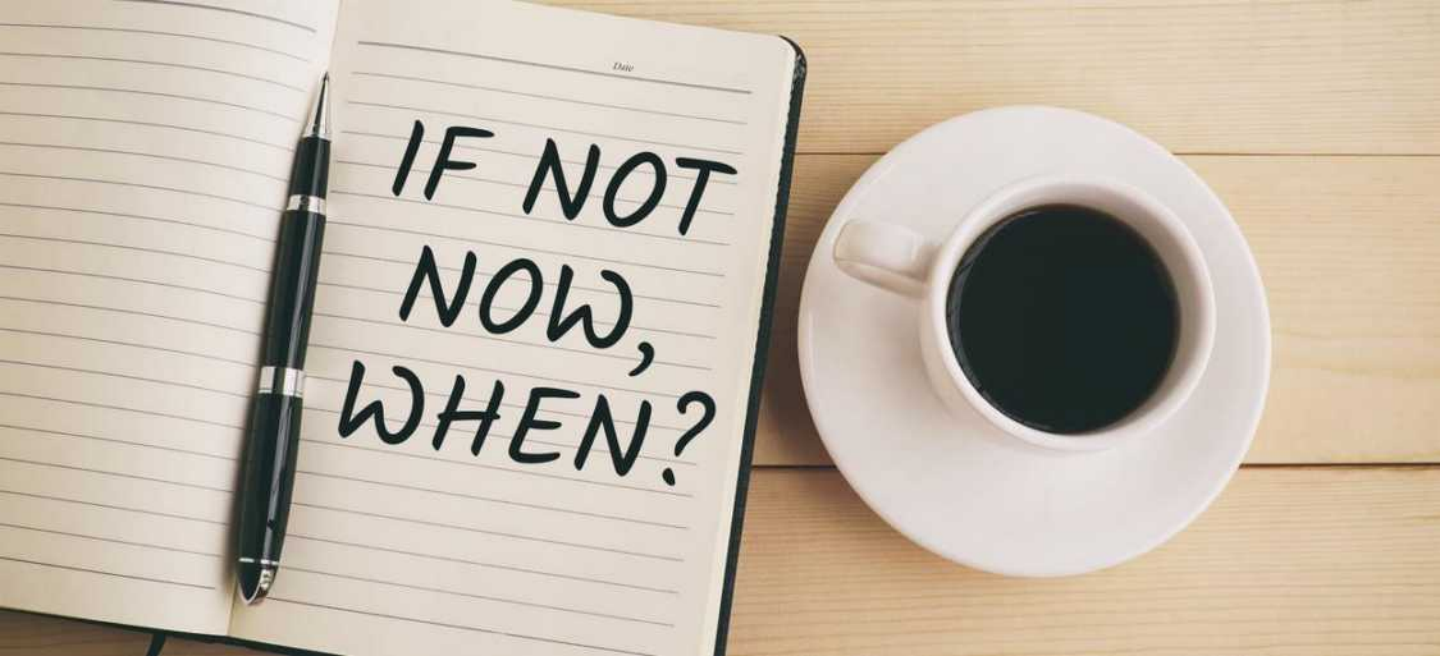
# FOLLOW YOUR PASSION



## Personal Goals

1. A crystal-clear understanding of **WHAT** you want to achieve in 2022.
2. A passionate desire and burning **WHY** that inspires massive action.
3. A plan of action which points to **HOW** success will be achieved.
4. Set specific deadlines. The purpose of a deadline is to dictate **WHEN** you want to reach your goals. Goals linked to a timeframe create a sense of urgency.

Personal goals	Why you want it?	How you're going to get it?	Timeline / When?



## 2022 Sales Plan And Major Priorities

	2022 Major Sales Goals	How I Plan on Getting There
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

**Are you clear on the differences between ACTIVITIES and RESULTS?**



# Every Champion Was Once A Contender That Refused to Give Up!

-RockyBalboa



**In sales, every day is game day. In order to win in this arena,  
you must show up with your “A” game every day.**

**Briefly describe what it looks like to show up with your “A” game.**

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**A few reminders you could set-up for yourself to bring  
your “A” game to work every day include.**

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Never Give Up!

## 2022 Sales Goals

Critical Success Factors	2022 GOALS
Revenue / premium	Yearly goal \$:
Monthly revenue / premium	Monthly goal \$:
Projected revenue from current book of business	Dollar amount \$:
Number of new clients needed to reach revenue goal	How many?    Revenue \$:
Retention goal	What's the number?
Closing ratio (submission to bind)	What's the number?
Minimum revenue size accounts you'll pursue	Dollar amount:
Number of qualified proposals submitted per month	How many?
Number of qualified appointments set per week	How many?
Referrals / introductions received per month	How many?
First conversations with d/m per month	How many?
Networking meetings per month	How many?
New qualified leads generated per month	How many?
Number of client visits per month	How many?

## 2022 Activity / Behavior Goals

Critical Success Factors	2022 Goals
New business revenue goal	
income goal	
Income / commission goal	

## 2022 Activity / Behavior Goals

Critical Success Factors	2022 GOALS
Outbound dials per week	
New LinkedIn connections per week	
Qualified conversations with d/m per week	
RRA appointments per month	
Number of qualified proposals sent per month	
Number of sales per month	
Number of referrals / introductions per quarter	
Conversation to qualified appointment conversions per month	
Appointment to qualified proposal conversions per month	
Proposal to bind conversions per month	

## Career Development Goals

Area of Development	2022 Goals
Number of professional development classes/workshops will you attend?	
How much time will you invest improving your sales craft?	
How many sales development books will you read in 2022?	
What comfort zone challenges will you work on improving in 2022?	
What will you do to consistently set yourself up to win profitable sales more often in 2022?	



Week of: \_\_\_\_\_

Day	New Dials	Conversations With D/M	Drop-Ins / Visits	New Qualified Appointments	Proposals/ Quotes	Referrals
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						

Week of: \_\_\_\_\_

Activity	Goals	Results for Week
New Dials		
Conversations with D/M		
New Drop-ins / Visits		
New Qualified Appointments		
Proposals / Quotes		
New Business Written		



## Goal setting plan that will get you to your sales goals in 2022

### GOALS

- Revenue goal \$ \_\_\_\_\_
- Monthly revenue goal \$ \_\_\_\_\_
- Revenue from current client base (book) \$ \_\_\_\_\_
- New revenue required to reach goal \$ \_\_\_\_\_
- Minimum size accounts I will pursue \$ \_\_\_\_\_
- Number of new sales required # \_\_\_\_\_
- Conversion rate goal (submit to bind) % \_\_\_\_\_

### DAILY BEHAVIORS

- ☐ I'm committed to invest \_\_\_\_\_ hours per week prospecting for new business opportunities.
- ☐ I'm committed to initiate a conversation with at least \_\_\_\_\_ new, qualified prospects per week.
- ☐ As a result of these conversations, I'm committed to schedule \_\_\_\_\_ in person meetings / phone meetings each month.
- ☐ I'm committed to ask \_\_\_\_\_ of my current clients for an introduction each month.
- ☐ During the next 30 days, I'm committed to initiate a conversation with \_\_\_\_\_ of my current clients and explore how I might secure additional work from them.
- ☐ And finally, I'm committed to take the following steps to increase the value I bring to my client relationships
  1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_



**“YOU CAN'T GET MUCH DONE IN LIFE IF YOU ONLY WORK ON THE DAYS WHEN YOU FEEL GOOD”** -JERRY WEST

**What are your HIGH-REVENUE SALES BEHAVIORS?**  
Revenue generating activities that will get you to your sales goals.

High Revenue Sales Behaviors	Why they're important?

Focusing on the highest and best use of your time involves making choices and trade-offs, identifying priorities, as well as determining and aligning actions with core values.

**Don't tell me how busy  
you are.  
Show me what you've  
gotten done.  
Words don't matter.  
Results do.**

In sales, daily sales activities are important—phone calls, meetings, qualified proposals and quotes—BUT WHAT MATTERS MOST, is your ability to convert activities into profitable sales results.

Behaviors / Activities	Conversion Percentage
First dials that convert into conversations with decisions makers	
Conversations with decisions makers that convert into qualified appointments	
Appointments that convert into qualified proposals / contracts	
Qualified proposals / contracts that convert into new business	
New business that converts into introductions	
Introductions that convert into new sales	
Cross-sell opportunities that convert into additional revenue	
Emails that convert into new appointments	

**Activity and behaviors are important,  
but at the end of the day, sales professionals are measured based on their RESULTS.**

# There is no substitute for hard work.

Thomas A. Edison

**Make a list of your top 20 TARGETED PROSPECTS  
and potential revenue they'll generate in 2022**

Targeted Accounts / Potential Revenue	Targeted Accounts / Potential Revenue



**It really doesn't matter how much you do,  
if what you're doing isn't what matters most.**

### **MANAGE YOUR BEHAVIOR, NOT YOUR TIME!**

- Make your calendar / day planner your friend
- Schedule time in your calendar / day planner to work on your top sales priorities
- Set appointments with yourself (block time in your calendar for “me” time) to work on your high-revenue, sales-generating activities that will get you to your goals
- Treat your “me” time appointments as you would treat a meeting with anyone else... make them a top priority
- Don't break your “me” time appointments just because someone wants you to do something. Stay focused on completing your most important tasks
- Channel less essential tasks (low pay) and requests to different time slots
- If an important “me” time appointment must be rescheduled, immediately enter the new day and time in your calendar
- Give yourself the same consideration you would give to anyone else when scheduling “me” time appointments
- It's easy to say “NOT RIGHT NOW” when there's a deeper purpose burning inside

**No one is too busy, IT'S JUST A MATTER OF PRIORITIZING.**



# SETTING GOALS

## IS THE FIRST STEP TO TURNING THE

# INVISIBLE

## INTO THE

# VISIBLE

Daily Tasks	Done
You'll get into the office early and prepare thoroughly for the day	
Your goals are in writing and you have a daily action plan to achieve them	
Your most important sales activities are scheduled in your calendar / daily planner	
Your list of prospective customers is complete and ready to be contacted	
Your list of follow-up calls is complete and ready-to-go	
You'll block a minimum of 90 minutes in your calendar everyday to prospect for new business	
You'll block time in your calendar to address unexpected issues	
You'll invest time to analyze what you've accomplished over the course of the day	
You'll block 20 minutes in your calendar for self-reflection	
Promises For Today	
You will not let distractions pull you away from your income-generating activities	
You will practice telling yourself "Not Now" if it's not an income-generating task	
You will get the big sales tasks out of the way first thing in the morning	
You will not check and respond to emails and voicemails during call/prospecting time	
You will prepare for tomorrow morning, so that you can hit the ground running	



# A GOAL WITHOUT A PLAN IS JUST A WISH.

## High Achiever's Daily ACTION PLAN

- Block a minimum of one hour per day, of uninterrupted time, in your calendar / daily planner to focus on new business development opportunities
- Make five prospecting phone calls before 10:00 a.m. to prospects
- Send five emails to prospects in your pipeline before 4 p.m.
- Mail one sales letter to a prospect in your pipeline
- Make a minimum of five follow-up phone calls before 2:00 p.m.
- Meet with or talk with a minimum of two new qualified prospects
- Reach out to one potential referral / introduction source
- Connect with one person on LinkedIn that might be interested in your products or services
- Get one advance commitment (an action step that moves the deal forward) from a prospective client in your pipeline
- Mail one handwritten thank you note to either a prospect or client
- Complete your CRM data entry work
- Review your progress, review your goals and prepare for the next day
- Remain in contact with your clients

**Remember that goals never fail,  
only execution and implementation does!**



## Important 2022 Goal-setting Ideas

- Be sure you're in the right frame of mind. GET YOUR THINKING RIGHT!
- Begin every day with a well-designed plan for success—not a to-do list
- Review your sales goals first thing in the morning, every morning
- At the end of each day, review progress and set new goals and action steps for the next day
- Put your goals in a familiar place where you can reference them daily. If you don't look at them every day, they soon will be out of sight and out of mind
- Align your goals with your purpose (your "why"). Too often, sales reps choose goals that are inconsistent with their priorities and beliefs. In a clash between your beliefs and wishes, your beliefs will win every time
- Quantify your goals. Make them as specific as possible. Many people never reach their goals because they are too vague about what they desire
- Update and tweak your goals and adjust daily activities based on your monthly results
- Anything less than a conscious commitment to doing what is important is an unconscious commitment to doing the unimportant
- Work on important tasks so that you're not always working on urgent tasks



## Proven steps to overcome PROCRASTINATION

- Recognize that you're procrastinating
- Forgive yourself for procrastinating in the past. Studies show that self-forgiveness can help you to feel more positive about yourself and reduce the likelihood of procrastination in the future
- Be reasonable in your expectations of yourself
- Commit to completing tasks. Focus on doing, not avoiding
- Tackle tasks as soon as they arise, rather than letting them build up over time
- Breakdown tasks into manageable bits
- Reward yourself when you achieve a goal
- Ask someone to check up on you. Peer pressure works
- When you get stuck in the weeds, try a new strategy rather than stop working
- Accept the fact that it's not always possible to complete everything in one day.
- Don't feel guilty if you don't finish a task, as long as you did your best
- Place the less-important tasks at the bottom of your list of things to do
- Work on one task at a time. Complete the task before moving on to the next one



## Proven steps to overcome PROCRASTINATION

If your sales are being negatively impacted by procrastination, what are the five things you can do to overcome the habit of procrastination?

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





## Transformational Sales Training & Coaching

At the Selling Skills INSTITUTE, our transformational (able to influence shifts in thinking and behavior) sales training and coaching programs empower sales professionals, sales leaders, sales teams, and entrepreneurs to attain a high level of achievement by:

1. Mastering the *thinking* game of selling.
2. Adopting high-performance *sales behaviors*.
3. Sharpening critical sales *skills* and *tactics*.
4. Following a proven sales/prospecting *playbook*.

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Helping To Humanize The Sales Profession ®

*"Shifting the way to think about selling"*