

# Optimization Model

## Key Business Drivers and Action Plan

Company Name:  
Owner/Manager:  
Industry Sector:

# of Salespeople:  
Working Days/Week:

Stage	Driver	Current Performance				Increase	Optimized Target				Total Increase
		Per Mo.	Per Wk.	Per Day	Per Person		Per Mo.	Per Wk.	Per Day	Per Person	
1. Increase leads and drive traffic	Current # of new leads/traffic										
2. Increase effectiveness of sales process (% and #s)	Step 1: Contact made (inbound/outbound)										
	Step 2: Meaningful Conversations										
	Step 3: Appointments booked/Opt Ins										
	Step 4: % Appts held/Meaningful Conversations										
3. Increase sales conversion	Current % close and # of sales										
4. Increase transaction value	Current average order value										
5. Add More Value Follow up, give more, receive more											
	I. Current Additional Sales % closed through follow up on declines and cancels										
	II. Current Follow Up for Referrals. % of Conversion										
Monthly Revenue											
Annual Revenue											
Business Impact		10									
Value At Time of Sale: Multiple Impact											

## 1 Increase Leads and Drive Traffic

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						
6						
7						
8						

## 2 Increase the Effectiveness of Your Sales Process

### Driver 1: Increase the Number of Contacts Made (Inbound/Outbound)

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						

### Driver 2: Increase the Number of Meaningful Conversations

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						

### Driver 3: Increase the Number of Appointments Booked/Opt Ins

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						

### Driver 4: Increase the Number of Appointments Held/Meaningful Conversations

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						

### 3 Increase Your Sales Conversion

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						

### 4 Increase Transaction Value

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						

### 5 Add More Value: Follow Up, Give More, Receive More

#### I. DELIVER “RAVING FAN” IMPECCABLE SERVICE

##### Driver 1: Current Additional Sales % Closed Through Follow Up On Declines and Cancels

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						

##### Driver 2: Current Follow Up For Referrals, % of Conversions

#	Action Item	Impact	Probability	Owner	Deadline	Resources/Notes
1						
2						
3						
4						
5						