

Sales Action Plan

For: _____

Establish your objective

What is the primary goal you want to accomplish? Try to be *SMART* about it (Specific, Measurable, Attainable, Realistic and Timely).

Step One: List your top 5 target customer segments (to increase *wallet share*)

These would include categories of customers that you want to get more business from. They could be Realtors, specific companies, certain types of customers (loan customers without checking), heavy ATM or debit card users, etc... Double check reports and other internal resources that help determine who the profitable relationships are for your institution.

1. _____

2. _____

3. _____

4. _____

5. _____

Step Two: List your top 5 prospects (to increase *market share*)

Identify other areas where you could generate more business. Are there niches that you are currently serving now that have other opportunities in your community (education, healthcare, manufacturing, electronic banking, etc...). If there are profitable categories of customers from One (above), look for prospects in similar industries.

1. _____

2. _____

3. _____

4. _____

5. _____

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Step Three: Defining the key employees that will help in the process

Identify those in the bank that will help you accomplish your goals and what role they will play.

1. _____

2. _____

3. _____

4. _____

5. _____

Step Four: Create your “milk route”

Now that you have identified who you are going to go after, you need to have a way to go get them. Depending on your role with the bank, a “milk route” could be something as simple as making a few phone calls and sending personalized notes to developing an out-of-office calling plan to get out of the bank and see the customer and/or prospects on a regular basis.

	Week 1	Week 2	Week 3	Week 4
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Weekend				

Will you...

<i>Call Them?</i>	<i>See Them?</i>
<i>Mail Them?</i>	<i>E-Mail Them?</i>

*Ensure that you perform the necessary follow-up (phone calls, thank you note, etc...) and tie up any loose ends.

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Step Five: Outreach and awareness

List things that you can do to get your message out so people know who you are and what you do. These items could be things like e-mail messages and taglines, direct mail campaigns, online tools (like blogs or Facebook pages), etc... Be consistent!

1. _____
2. _____
3. _____
4. _____
5. _____

Step Six: Create your “personal brand”

Pick five things that you can start to use that will help to create your own personal brand.

1. _____
2. _____
3. _____
4. _____
5. _____

Step Seven: Develop a networking plan

What are some of the things that you can do to get more “face time” with customers and prospects on a monthly basis?

1. _____
2. _____
3. _____
4. _____
5. _____

Step Eight: Educate yourself

What can you do for an hour each week to improve yourself? Read a book, industry journal, bank literature on products/services you don't know well, attend training seminars, podcasts, webinars, etc...

1. _____
2. _____
3. _____
4. _____
5. _____

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Step Nine: Review and adjust

Review this plan on a regular basis and adjust areas that need modification every month. This will be a “work in process” and over time will develop into a useful tool for your sales efforts.

Step Ten: Stay motivated

What are some of the things you can do to stay motivated?

1. _____
2. _____
3. _____
4. _____
5. _____

Notes: