



Document 16-06

Personal Business Plan

Role and Purpose:

As an inside sales telephone representative for our organization, you are accountable for helping organizations in your territory buy our products and services. Your territory will consist of qualified and selected customers. Your purpose is to reach your sales goal each month, achieve your planned annual rate of call (PAR) targets, build strong customer relationships, provide customer service that exceeds the customer expectations, and complete the activities listed in this plan.

Sales Result Expectations:

January	February	March	April	May	June
July	August	September	October	November	December

Activity Expectations:

- _____ Average customer conversations per day
- _____ Monthly proposals sent to customers
- _____ Average phone time per day
- _____ Leads generated per month

Signed: _____
Telephone Sales Representative
Manager