

# Salesperson's Organizational Planbook

A Complete System  
for Organizing  
Your Day



# INSTRUCTIONS

Welcome to the expanded edition of the **Salesperson's Organizational Planbook**. For those familiar with the original edition, please note that all categories remain the same, however, some have been expanded and relocated to the back of the book. In addition, a statistics section has been added to help you plot the growth of your business.

## **Today's Goals**

Each morning, write down the number of Ups, Sales, Deliveries, Follow-Up Calls, Prospect Calls, and Mailouts you intend on making that day.

## **Today's Totals**

At the end of each day, record the actual results of your efforts.

## **Things To Do List**

List all of the tasks you need to accomplish for that day. Remember to transfer all unfinished business from previous days. Once each task is completed, note its completion by striking through with a yellow highlight marker. This allows you to view the tasks you've completed.

## **Phone-Ups**

Record all of the Phone-Ups and nature of call you receive that day. Review this list often and follow-up for the purpose of setting appointments and making sales.

## **Follow-Ups**

List all of the Follow-Up Calls you need to make that day, and purpose for calling. Then make a notation if your call was successful, and when you need to follow-up again.

## **Appointment**

Record all appointments you've scheduled along with a phone number in order to confirm the appointment.

## **Ups**

Record the names and purpose of visit of all new prospects that visited the dealership.

## **Want List**

List all RVs requested by customers that are not part of your current inventory and review this list often. In addition to doing a locator search, make a practice of taking this list with you when you take your daily inventory walk.

## **Prospect Calls**

A steady number of prospect calls should be made daily in order to increase your client base. Although prospecting is never easy, the more calls you make, the easier it becomes. Develop a script to help make your calling easier and more accepting to the prospect.

## **Mailouts**

Mailouts are a great source for introducing yourself and keeping your name alive with future prospects and current customers. Make sure you record each Mailout including routine paperwork.

## **Customer Log**

In addition to recording the sale, make certain you've recorded all other pertinent information about the customer before he/she takes delivery. This will allow you to develop future business, and give you more information for following-up.

# INSTRUCTIONS

## Statistics

The Statistics section of the planbook will help you predict how to increase your sales and profits. By mathematically tracking each month, you can determine where improvement or enhancement needs to take place. Follow this step-by step process:

1. Fill in the dates at the top of the Weekly Statistics sheet.
  2. Record each day's activities and source of business.
  3. At the end of each week, total all of the categories.
  4. Transfer the weekly totals to the corresponding week on the Weekly Statistical Summary sheet.
  5. At the end of the month, total the categories.
  6. Transfer the totals to the Monthly Statistical Summary sheet.
  7. Calculate the Closing Ratios, Total Commissions, and Gross Averages.
  8. Plot Total Monthly Deliveries and Commissions on the respective graphs, bringing forward Totals from the previous months.
- If you want to increase your sales, it may be as easy as increasing your numbers.
  - Watch for discrepancies in each month regarding your sales and profits. If you notice your sales dropping, look to see where your statistics may be fluctuating and adjust them accordingly.

Date \_\_\_\_\_

## Today's Goals

Ups \_\_\_\_\_  
Sales \_\_\_\_\_  
Deliveries \_\_\_\_\_  
Follow-Up Calls \_\_\_\_\_  
Phone-Ups \_\_\_\_\_  
Prospect Calls \_\_\_\_\_  
Mailouts \_\_\_\_\_

## Today's Totals

Ups \_\_\_\_\_  
Sales \_\_\_\_\_  
Deliveries \_\_\_\_\_  
Follow-Up Calls \_\_\_\_\_  
Phone-Ups \_\_\_\_\_  
Prospect Calls \_\_\_\_\_  
Mailouts \_\_\_\_\_

## Things To Do List

1. _____	13. _____
2. _____	14. _____
3. _____	15. _____
4. _____	16. _____
5. _____	17. _____
6. _____	18. _____
7. _____	19. _____
8. _____	20. _____
9. _____	21. _____
10. _____	22. _____
11. _____	23. _____
12. _____	24. _____



Date \_\_\_\_\_

# Appointments

- 8:00am \_\_\_\_\_
- 8:30am \_\_\_\_\_
- 9:00am \_\_\_\_\_
- 9:30am \_\_\_\_\_
- 10:00am \_\_\_\_\_
- 10:30am \_\_\_\_\_
- 11:00am \_\_\_\_\_
- 11:30am \_\_\_\_\_
- 12:00pm \_\_\_\_\_
- 12:30pm \_\_\_\_\_
- 1:00pm \_\_\_\_\_
- 1:30pm \_\_\_\_\_
- 2:00pm \_\_\_\_\_
- 2:30pm \_\_\_\_\_
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- 3:30pm \_\_\_\_\_
- 4:00pm \_\_\_\_\_
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- 5:00pm \_\_\_\_\_
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- 7:00pm \_\_\_\_\_
- 7:30pm \_\_\_\_\_
- 8:00pm \_\_\_\_\_
- 8:30pm \_\_\_\_\_
- 9:00pm \_\_\_\_\_
- 9:30pm \_\_\_\_\_
- 10:00pm \_\_\_\_\_

# Ups

- Name \_\_\_\_\_
- Address \_\_\_\_\_
- City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_
- Phone: Hm \_\_\_\_\_
- Bus \_\_\_\_\_ Fax \_\_\_\_\_
- Type of Vehicle \_\_\_\_\_
- Trade-In \_\_\_\_\_
  
- Name \_\_\_\_\_
- Address \_\_\_\_\_
- City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_
- Phone: Hm \_\_\_\_\_
- Bus \_\_\_\_\_ Fax \_\_\_\_\_
- Type of Vehicle \_\_\_\_\_
- Trade-In \_\_\_\_\_
  
- Name \_\_\_\_\_
- Address \_\_\_\_\_
- City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_
- Phone: Hm \_\_\_\_\_
- Bus \_\_\_\_\_ Fax \_\_\_\_\_
- Type of Vehicle \_\_\_\_\_
- Trade-In \_\_\_\_\_
  
- Name \_\_\_\_\_
- Address \_\_\_\_\_
- City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_
- Phone: Hm \_\_\_\_\_
- Bus \_\_\_\_\_ Fax \_\_\_\_\_
- Type of Vehicle \_\_\_\_\_
- Trade-In \_\_\_\_\_







# Mailouts

Date	Name	Phone	Follow-Up Information

E

V

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P

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S

# Customer Log

Name \_\_\_\_\_  
Spouse \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_  
Phone: Hm \_\_\_\_\_  
          Bus \_\_\_\_\_ Fax \_\_\_\_\_  
Type of Vehicle \_\_\_\_\_  
Trade-In \_\_\_\_\_  
Date Delivered \_\_\_\_\_ Stock # \_\_\_\_\_  
Gross Profit \_\_\_\_\_ Commission \_\_\_\_\_  
Husbands Birthday \_\_\_\_\_  
Wifes Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Anniversary \_\_\_\_\_  
Other Vehicles in Household \_\_\_\_\_  
Other Vehicles in Household \_\_\_\_\_

Name \_\_\_\_\_  
Spouse \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_  
Phone: Hm \_\_\_\_\_  
          Bus \_\_\_\_\_ Fax \_\_\_\_\_  
Type of Vehicle \_\_\_\_\_  
Trade-In \_\_\_\_\_  
Date Delivered \_\_\_\_\_ Stock # \_\_\_\_\_  
Gross Profit \_\_\_\_\_ Commission \_\_\_\_\_  
Husbands Birthday \_\_\_\_\_  
Wifes Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Anniversary \_\_\_\_\_  
Other Vehicles in Household \_\_\_\_\_  
Other Vehicles in Household \_\_\_\_\_

Name \_\_\_\_\_  
Spouse \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_  
Phone: Hm \_\_\_\_\_  
          Bus \_\_\_\_\_ Fax \_\_\_\_\_  
Type of Vehicle \_\_\_\_\_  
Trade-In \_\_\_\_\_  
Date Delivered \_\_\_\_\_ Stock # \_\_\_\_\_  
Gross Profit \_\_\_\_\_ Commission \_\_\_\_\_  
Husbands Birthday \_\_\_\_\_  
Wifes Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Anniversary \_\_\_\_\_  
Other Vehicles in Household \_\_\_\_\_  
Other Vehicles in Household \_\_\_\_\_

Name \_\_\_\_\_  
Spouse \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_  
Phone: Hm \_\_\_\_\_  
          Bus \_\_\_\_\_ Fax \_\_\_\_\_  
Type of Vehicle \_\_\_\_\_  
Trade-In \_\_\_\_\_  
Date Delivered \_\_\_\_\_ Stock # \_\_\_\_\_  
Gross Profit \_\_\_\_\_ Commission \_\_\_\_\_  
Husbands Birthday \_\_\_\_\_  
Wifes Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Childrens Birthday \_\_\_\_\_  
Anniversary \_\_\_\_\_  
Other Vehicles in Household \_\_\_\_\_  
Other Vehicles in Household \_\_\_\_\_

# WEEKLY STATISTICS

DATE	UPS	TOTAL SALES	DELIVERIES	COMMISSIONS	REFERRAL SALES	REPEAT CUSTOMER SALES	PHONE-UPS	PHONE-UP SALES	PROSPECT CALLS	PROSPECT CALL SALES	MAILOUTS	MAILOUT SALES	FOLLOW-UP CALLS
Monday													
Tuesday													
Wednesday													
Thursday													
Friday													
Saturday													
Sunday													
Totals													

S  
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M  
A  
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L  
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WEEK OF \_\_\_\_\_

# WEEKLY STATISTICS

DATE	GROSS PROFIT TOTAL	GROSS PROFIT AVERAGE	MOTOR COACHES	TRAVEL TRAILERS	TENT CAMPERS	5TH WHEELS	USED RVS	SERVICE CONTRACTS	ACCESSORY SALES	FINANCE CONTRACTS APPROVED	FINANCE CONTRACTS DECLINED	CASH DEALS	
<i>Monday</i>													
<i>Tuesday</i>													
<i>Wednesday</i>													
<i>Thursday</i>													
<i>Friday</i>													
<i>Saturday</i>													
<i>Sunday</i>													
<i>Totals</i>													

WEEK OF \_\_\_\_\_

# WEEKLY STATISTICAL SUMMARY

DATE	UPS	TOTAL SALES	DELIVERIES	COMMISSIONS	REFERRAL SALES	REPEAT CUSTOMER SALES	PHONE-UPS	PHONE-UP SALES	PROSPECT CALLS	PROSPECT CALL SALES	MAILOUTS	MAILOUT SALES	FOLLOW-UP CALLS
<i>Week 1</i>													
<i>Week 2</i>													
<i>Week 3</i>													
<i>Week 4</i>													
<i>Week 5</i>													
<i>Totals</i>													

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# MONTHLY STATISTICAL SUMMARY

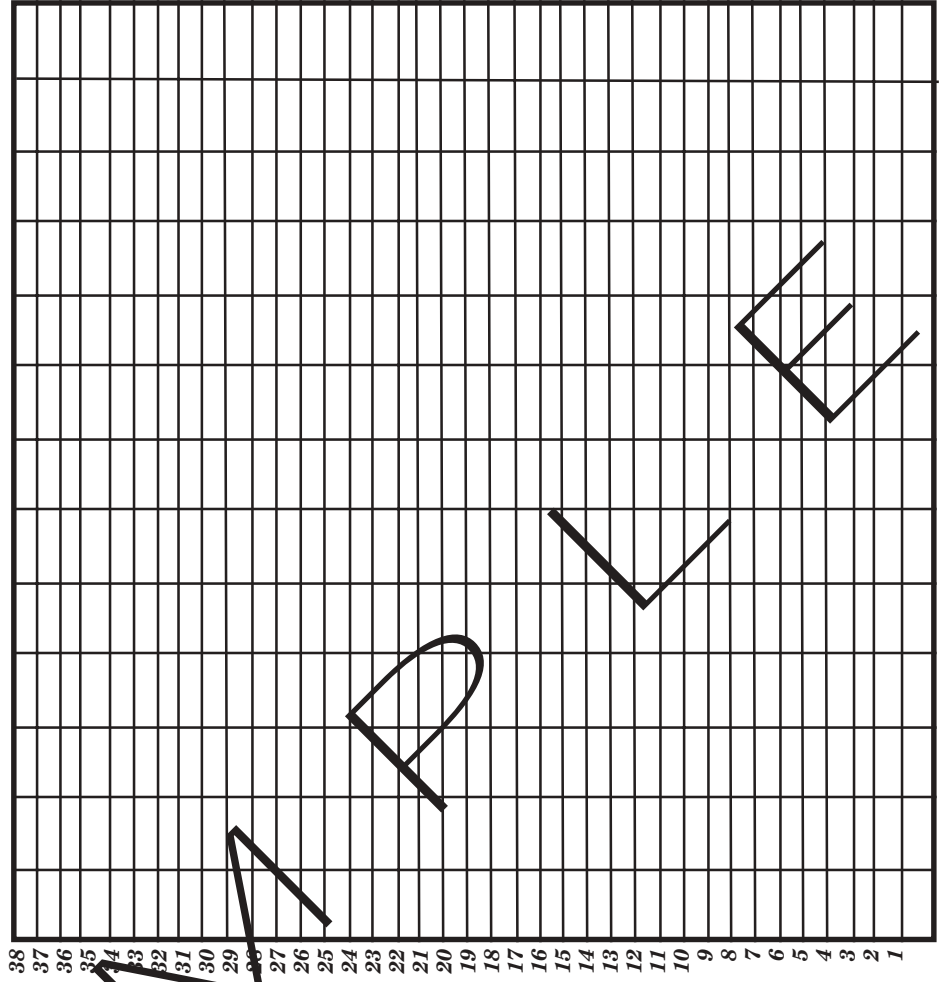
UPS	TOTAL SALES	DELIVERIES	COMMISSIONS	REFERRAL SALES	REPEAT CUSTOMER SALES	PHONE-UPS	PHONE-UP SALES	PROSPECT CALLS	PROSPECT CALL SALES	MAILOUTS	MAILOUT SALES	FOLLOW-UP CALLS
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Current Month	Running Totals
S	A

## CLOSING RATIOS:

$\% \text{ of Deliveries} = \frac{\text{Deliveries} \div \text{Sales}}{\% \text{ of Sales}} \times 100$   
 $\% \text{ of Total Deliveries} = \frac{\text{Deliveries} \div \text{Sales}}{\% \text{ of Total Sales}} \times 100$   
 $\text{Sales} \div \text{Ups} = \dots$   
 $\text{Sales} \div \text{Ups} = \dots$

PLOT YOUR TOTAL DELIVERIES EACH MONTH



J F M A M J J A S O N D

# MONTHLY STATISTICAL SUMMARY

DATE	GROSS PROFIT TOTAL	GROSS PROFIT AVERAGE	MOTOR COACHES	TRAVEL TRAILERS	TENT CAMPERS	5TH WHEELS	USED RVs	SERVICE CONTRACTS	ACCESSORY SALES	FINANCE CONTRACTS APPROVED	FINANCE CONTRACTS DECLINED	CASH DEALS

Current Month												

Running Totals												

**COMMISSION & GROSS AVERAGES:**

*Monthly Commission Average*    *Monthly Gross Average*  
*Commission ÷ Del* = \_\_\_\_\_    *Gross ÷ Del* = \_\_\_\_\_  
*Total Commission Average*    *Total Gross Average*  
*Commission ÷ Del* = \_\_\_\_\_    *Gross ÷ Del* = \_\_\_\_\_

