

**My S1 Digital Sales Planner**

**ADAPTING to a digital environment**

**Name:**

I**NSTRUCTIONS FOR COMPLETION**

* Answer all of the questions in each section
* Replace <> in the tables with your responses
* It should take 15-20 minutes to complete
* If appropriate share with a colleague or leader/manager for feedback

**My Vision Plan**

|  |  |
| --- | --- |
| **Planning Question** | **My Response** |
| **What is the vision?** | <> |
| **Why is this plan important?** | <> |
| **What is the monthly production target (in Cases or FYC)?** | <> |
| **When does this target need to be achieved?** | <> |

**My Personal Strategy Plan**

|  |  |
| --- | --- |
| **Planning Question** | **My Response** |
| **What areas will I include in my Personal Digital Strategy?** | <> |
| **When will I complete my goal-setting?** | <> |
| **How do I view the importance of branding, content, and communication?** | <> |
| **What is my commitment to monitoring my digital activity?** | <> |

**My Sales Activity Plan**

Record your actual and planned digital activities as a monthly average

|  |  |  |
| --- | --- | --- |
| **Key Digital Sales Activities** (Monthly) | **Where I am now** | **Where I want to be (in 6 months)** |
| **# of Posts** | <> | <> |
| **# of Views** | <> | <> |
| **# of Likes, Shares, & Comments** | <> | <> |
| **# of Digital Leads** | <> | <> |
| **# of Contacts** | <> | <> |
| **# of Appts Set** | <> | <> |
| **# of Appts Kept** | <> | <> |
| **# of Discoveries** | <> | <> |
| **# of Presentations** | <> | <> |
| **# of Sales** | <> | <> |

**My Summary Plan**

|  |  |
| --- | --- |
| **Planning Question** | **Your Response** |
| **How many items will I post each month?** | <> |
| **What is my monthly digital lead target? (Views + Likes + Shares + Comments)** | <> |
| **What is my monthly digital sales target?** | <> |

**My Learning Plan**

|  |  |
| --- | --- |
| **Planning Question** | **Your Response** |
| **How will I maintain my digital edge?** | <> |
| **What are my goals for Continued Learning?** | <> |