Your sales rep should have Metrics in place for certain number of DAILY:

* Cold Call Visits
* Warm Sales Visits
* Sales Presentation Appointments
* Building Walk-throughs (after a sale)\*
* Implementation Meetings (after sale)\*
* Handwritten and mailed Thank You’s to those that signed or gave you their time
* Visits to existing clients to maintain the relationship (after first month)
* **One day a week can be set aside for calling on Agents, Plumbers, and other**

**SUGGESTED DAILY METRICS (FOR MOST MARKETS) -** *minimums*

|  |  |
| --- | --- |
| 10 | A picture containing text  Description automatically generatedCold Call Visits \* |
| 5 | Warm Sales Visits |
| 1 | Appointment w/ Decision maker |
| 1 | Building Walk-Through (after the Agreement is signed) |
| 1 | Implementation Meeting\*\* |
| 5 | Handwritten Thank You's (Mailed) |
| 10 | Resource Visits (after the sale) |
| \* these may go down as the Sales Numbers go up (never less than 5 CCV in a day) |
| \*\* Implementation meetings won’t happen every day (only as the sale and walk-through are completed) |

A **Cold Call Visit (CCV)** means NEVER VISITED THE BUSINESS PREVIOUSLY.

A **Warm Sales Visit (WSV** means contacting someone in person that you have an “arms-length” relationship with – such as a Connection on LinkedIn or other Social Media accounts. OR: someone in the commercial world that you have been introduced to!

A **Building Walk-Through (BWT)** or **Implementation (IMM)** meeting will happen as part of the Sales process once the presentation has been made, and the customer signs an Agreement.

A **Resource Visit (RSV)** is the maintaining of the relationship once the sale is made. This means EVERY client is visited every month. Most “visits” will be a few minutes and will be simply dropping off a Maven Article that is pertinent to the CUSTOMER’s business or industry. (It’s NOT about you!)