

Goal Setting Instructions

1. Write your total goal for deliveries for the upcoming month in the '# Delivered' and 'Total' intersection box
2. Divide that total number of deliveries into Sources. For example, if your goal is 20 deliveries, you might divide them as follows: 8 floor traffic, 4 phone traffic, 2 referrals, 4 repeat clients, and 2 self-generated clients = 20 deliveries.
3. Working **left to right**, for each source amount, estimate the following numbers: closing ratio; then enter the number needed to enter the dealership at that ratio to equal the delivered units. Next, estimate the entry rate for each source, and finally the total number of contacts it would take at that entry rate to generate the number who enter that you're forecasting.
4. Finally, reading from **right to left**, interpret the data as follows: **X** = number of contacts, multiplied by the entry rate of **Y % = Z**, the total number who enter the dealership. **Z** multiplied by the closing ratio **R% = Q**, the total delivered for that source.
5. For tracking your performance, simply log each customer for the month and note the following information:
 - ⇒ Client name(s)
 - ⇒ From what source did they originate?
 - ⇒ Did they enter the dealership?
 - ⇒ Did you deliver them?
6. Log your actual numbers beside your goals.
7. Adjust your percentage estimates where necessary.
8. Fine-tune your activities by improving your percentages wherever possible; for example, if you notice your closing ratio is down from one month to the next, determine why. Do you need to improve your walkaround presentations? Do you need to improve your closing skills? Do you need to interview more effectively?
9. You may wish to divide your monthly contact numbers into weekly, or even daily numbers to make them more tangible and attainable.

	# Delivered	Close Ratio	# Who Enter	Entry Rate	# of Contacts
<u>Source</u>	<i>Goal / Actual</i>	<i>Goal / Actual</i>	<i>Goal / Actual</i>	<i>Goal / Actual</i>	<i>Goal / Actual</i>
Floor Traffic	8 / 6	20% / 20%	40 / 30	100% / 100%	40 / 30
Phone Traffic	4 / 6	50% / 75%	8 / 8	25% / 20%	32 / 40
Referral Clients	2 / 2	50%	4 / 4	20% / 40%	20 / 10
Repeat Clients	4 / 3	67% / 50%	6 / 6	10% / 7.5%	60 / 80
Self-Generated Clients	2 / 3	50% / 50%	4 / 6	10% / 5%	40 / 120
<i>Totals</i>	20 / 20	32% / 37%	62 / 54	32% / 19%	192 / 280