

SALES PERSON DAILY PROGRESS REPORT

The Daily Progress Report is submitted to the sales manager on a daily or weekly basis so the manager can provide feedback to help salespeople become more successful on a continuous, real-time basis. This report is in addition to the Field Sales Report that is submitted to the sales manager on a monthly basis. Initially it may be difficult for salespeople to complete reports correctly, so allot additional time in the first few months to check the accuracy of these reports.

Name: _____

Week Beginning (Date): _____

| Day | Record of Activity | Initial Approaches | Presentations (10-15 per day) | Sales | Service Visits |
|-----|---|--------------------|-------------------------------|-------|----------------|
| Mon | //X// X /X/X/S// X // X X /X/X/X/X/ | 30 | 12 | 4 | 1 |
| Tue | | | | | |
| Wed | | | | | |
| Thu | | | | | |
| Fri | | | | | |
| | WEEK TOTAL | 30 | 12 | 4 | 1 |
| | DAILY AVERAGE (divide total by number of days worked) | 30.0 | 12.0 | 4.0 | 1.0 |

| Sales Manager To Do | |
|---|----------------------------------|
| Initial Approaches turning into Presentations | Presentations turning into Sales |
| 40% | 33% |
| | |
| | |
| | |
| | |
| 40% | 33% |
| | |

/ = Initial Approach X = Presentation ~~X~~ = Sale S = Service Visit

Instructions:

1. Update card in the field after each "Initial Approach."
2. Use the symbols noted above. Use only one symbol per household.
3. A "Sale" counts as a "Presentation" and as an "Initial Approach"; a "Presentation" counts as a "Initial Approach" as well.
4. Fill out the card as you make each "Initial Approach" so that it shows the sequence of activities.
5. Total the "Initial Approaches," "Presentations," "Sales," and "Service Visits" each day.
6. At the end of the week total up the "Initial Approaches," "Presentations," "Sales," and "Service Visits" columns for your weekly performance.
7. Calculate your daily average.
8. Sign your card and turn it in at the end of the week to your manager.
9. Your manager will calculate the percentages and discuss your work performance with you.