

## MaxSales Schedule Efficiency System

*Complimentary Hardcopy for Sales Teams working Monday – Friday  
(Online Version Offers Customized Schedules)*

### Goal:

The MaxSales Schedule Efficiency System significantly increases the number of Contacts your Sales Team speaks with each month. By establishing Call Frequencies and tracking conversations, each Contact is properly maintained and your Sales Team doesn't spend as much time determining who to call next. Effectively used, your Sales Team can increase their contact list 40-60% within 90 days, employing the same effort.

Result: Increased Sales, Increased Customer Satisfaction, Increased Profits!

### How to use:

- Determine how many calls to unique contacts you can make each day. If you are unsure, use a number between 10 and 20. As you get used to the system you can adjust this number. Put the number on Line A. Multiply number by 20 business days. This is your Schedule Capacity. Put this number on Line B.
- Identify the call Schedule Frequency for each customer that will maximize your total sales. Each contact will be called either daily, weekly, bi-weekly or monthly. (MaxSales.com has many additional frequencies available and also works with visits.)
- Complete the Schedule Frequency Form with all of your current contacts. Print out several copies so that you are able to list all of your contacts. Enter your total contacts for each frequency on line C. Line D represents your current Schedule Capacity percentage, or the percentage of your schedule currently being utilized for sales. In order to maximize your sales, this number should be between 100-125%. If your Schedule Capacity is less than 100%, you need to add contacts or increase the frequency of calls made to your current contacts. If your Schedule Capacity is higher than 125% and you are successfully making these calls, increase Line A to a number that more accurately represents your current effort. If you are above 125% and unable to make of the scheduled calls, you should reduce your number of contacts or reduce the call frequency of some of your contacts.
- Keep track of when you speak to each contact (voice messages and e-mails don't count!) and make sure you don't miss calling them within the assigned frequency. Check off each box when you complete the call.
- At the end of each month, total the number of contacts you reached within their schedule frequency. Put that number on Line E.
- Line F is your Schedule Effectiveness. On step one, you identified what was required to maximize your sales and your Schedule Effectiveness represents how close you came to achieving MaxSales.

|    |   |      |
|----|---|------|
| A. | Calls to Unique Contacts per day                  |      |
|    | Multiply Line A (# working days/month) by 20      | * 20 |
| B. | Schedule Capacity for the month                   |      |
| C. | Total # of contacts with :                        |      |
|    | Daily Frequencies _____ x 20 _____                |      |
|    | Weekly Frequencies _____ x 4 _____                |      |
|    | Bi-Weekly Frequencies _____ x 2 _____             |      |
|    | Monthly Frequencies _____ x 1 _____               |      |
|    | Total Scheduled Calls                             |      |
| D. | Current Schedule Capacity % = Line C/Line B * 100 | %    |
| E. | Number of Successful Schedule Frequency Calls     |      |
| F. | Schedule Effectiveness = Line E/Line C * 100      | %    |

| Schedule Effectiveness (Line F): |               |
|----------------------------------|---------------|
| 90% +                            | Exceptional   |
| 80-90%                           | Excellent     |
| 65-80%                           | Good          |
| 50-65%                           | Below average |
| Below 50%                        | Very Poor     |

|                     | Last Month | MaxSales Month 1 | MaxSales Month 2 | MaxSales Month 3 |
|---------------------|------------|------------------|------------------|------------------|
| Sales               |            |                  |                  |                  |
| Schedule Capacity   |            |                  |                  |                  |
| Schedule Efficiency |            |                  |                  |                  |
| Number of Contacts  |            |                  |                  |                  |

**KEEP TRACK OF YOUR PROGRESS!**

Our online version of MaxSales gives you real time data on your progress and keeps track of your long term improvement. We also offer many additional measurement tools to get the most productivity out of your Sales Team. For more information, visit us at [www.maxsales.com](http://www.maxsales.com) or call 800-XXX-XXXX.

## Schedule Capacity Chart How Many Contacts Should You Have?

1. Determine how many unique contacts you can call each day: \_\_\_\_\_
  
2. On average, how frequently do you contact them?
  - Daily
  - Weekly
  - Bi-Weekly
  - Monthly
  - Bi-Monthly
  - Quarterly
  - 6 Months
  - Annually
  
3. Use the chart below to determine your schedule capacity. To achieve MaxSales, you need to have at least this number of Active Contacts.

### Quick Chart Based on 20 Day Month

| Average Frequency | Calls to Unique Contacts/Day |      |      |      |      |
|-------------------|------------------------------|------|------|------|------|
|                   | 10                           | 15   | 20   | 25   | 30   |
| <b>Daily</b>      | 10                           | 15   | 20   | 25   | 30   |
| <b>Weekly</b>     | 50                           | 75   | 100  | 125  | 150  |
| <b>Bi-Weekly</b>  | 100                          | 150  | 200  | 250  | 300  |
| <b>Monthly</b>    | 200                          | 300  | 400  | 500  | 600  |
| <b>Bi-Monthly</b> | 400                          | 600  | 800  | 1000 | 1200 |
| <b>Quarterly</b>  | 600                          | 900  | 1200 | 1500 | 1800 |
| <b>6 Months</b>   | 1200                         | 1800 | 2400 | 3000 | 3600 |
| <b>Annually</b>   | 2400                         | 3600 | 4800 | 5000 | 6200 |



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## Contacts I Should Call **Daily**

| Contact                   | Phone # | Days |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    | Sched-<br>uled | Calls<br>Made | Sale<br>Made |  |
|---------------------------|---------|------|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----------------|---------------|--------------|--|
|                           |         | 1    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 |                |               |              |  |
|                           |         |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    | 20             |               |              |  |
|                           |         |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |                | 20            |              |  |
|                           |         |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |                | 20            |              |  |
|                           |         |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |                | 20            |              |  |
|                           |         |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |                | 20            |              |  |
| Total # of Daily Contacts |         |      |   |   |   |   |   |   |   |   |    |    |    |    |    |    |    |    |    |    |    |                |               |              |  |

## Contacts I Should Call **Weekly**

| Contact                    | Phone # | Week 1 | Week 2 | Week 3 | Week 4 | Sched-<br>uled | Calls<br>Made | Sale<br>Made |
|----------------------------|---------|--------|--------|--------|--------|----------------|---------------|--------------|
|                            |         |        |        |        |        | 4              |               |              |
|                            |         |        |        |        |        | 4              |               |              |
|                            |         |        |        |        |        | 4              |               |              |
|                            |         |        |        |        |        | 4              |               |              |
|                            |         |        |        |        |        | 4              |               |              |
|                            |         |        |        |        |        | 4              |               |              |
|                            |         |        |        |        |        | 4              |               |              |
|                            |         |        |        |        |        | 4              |               |              |
| Total # of Weekly Contacts |         |        |        |        |        |                |               |              |

## Contacts I Should Call **Bi-Weekly**

| Contact                       | Phone # | Week 1 & 2 | Week 3 & 4 | Sched-<br>uled | Calls<br>Made | Sale<br>Made |
|-------------------------------|---------|------------|------------|----------------|---------------|--------------|
|                               |         |            |            | 2              |               |              |
|                               |         |            |            | 2              |               |              |
|                               |         |            |            | 2              |               |              |
|                               |         |            |            | 2              |               |              |
|                               |         |            |            | 2              |               |              |
|                               |         |            |            | 2              |               |              |
|                               |         |            |            | 2              |               |              |
|                               |         |            |            | 2              |               |              |
| Total # of Bi-Weekly Contacts |         |            |            |                |               |              |

## Contacts I Should Call **Monthly**

| Contact                     | Phone # | Month | Sched-<br>uled    | Calls<br>Made | Sale<br>Made |
|-----------------------------|---------|-------|-------------------|---------------|--------------|
|                             |         |       | 1                 |               |              |
|                             |         |       | 1                 |               |              |
|                             |         |       | 1                 |               |              |
|                             |         |       | 1                 |               |              |
|                             |         |       | 1                 |               |              |
|                             |         |       | 1                 |               |              |
|                             |         |       | 1                 |               |              |
|                             |         |       | 1                 |               |              |
| Total # of Monthly Contacts |         |       |                   |               |              |
|                             |         |       | <b>Page Total</b> |               |              |

## MaxSales Schedule Efficiency System

### EXAMPLE

Jon has determined he can make 15 calls to unique customers each day. His schedule capacity is:  
 $15 \times 20(\text{work days/mo}) = 300$  calls each month.

He currently has the following contacts with these call frequencies: He currently has the following con-  
 tacts with these call frequencies:

|                              |        |   |            |
|------------------------------|--------|---|------------|
| Daily                        | 1 x 20 | = | 20         |
| Weekly                       | 33 x 4 | = | 132        |
| Bi-Weekly                    | 50 x 2 | = | 100        |
| Monthly                      | 17 x 1 | = | 17         |
| <b>Total Scheduled Calls</b> |        |   | <b>269</b> |

His current schedule capacity is  $269(\text{scheduled})/300(\text{capacity}) = 89\%$ .

This means that even if Jon makes all of his shceduled calls, he will be 11% under his capability. Jon needs to add at least 31 more calls to his schedule for the month.

The month has passed and Jon successfully made 221 calls. He was able to speak with his contacts (no voice mail or emails) 221 times and sold \$217,000 this month. He was unable to reach 7 of his contacts at all, and missed making calls to another 18 of his contacts. His Schedule Effectiveness was  $221/300 = 74\%$ . If Jon were able to achieve 100% effectiveness, his sales would have been approximately  $\$217,000/.74 = \$293,243$  or \$76,000 more than he achieved.

Here are a few of the important statistics that MaxSales uses to get the most out of your sales team's day:

|                           | Current Month    | Rank | Notes  |
|---------------------------|------------------|------|--|
| Full Schedule Capacity    | 300              | 5th  |  |
| Current Schedule Capacity | <b>269 (89%)</b> | 6th  |  |
| Schedule Effectiveness    | 221 (74%)        | 6th  |  |
| Total Calls               | 651              | 3rd  |  |
| Sales/Call                | \$333            |      |  |
| Sales/Scheduled Call      | \$806            |      |  |
| Missed Calls              | 48               | 9th  |  |
| Sales                     | \$217,000        | 6th  | 6th versus group<br>5th best personally<br>126th best ever for group |