THE SALES GROWTH OPPORTUNITY PLANNER

Are you making the most of every opportunity to grow your sales?

Growth isn't always about finding more customers. Look across all three sales opportunities before deciding where to focus your next 90 days.

1 ATTRACT | More qualified leads

Are we reaching enough of the right potential customers?

- Where do our best customers come from today?
- Which channels or referral partners could bring more qualified opportunities?
- What are we not doing consistently?

Our biggest opportunity:

2 CONVERT | More opportunities into customers

Are we making the most of the leads we already have?

- Where do potential sales stall or get lost?
- How consistently do we follow up on inquiries and proposals?
- What could improve our sales conversations or conversion?

Our biggest opportunity:

RESEARCH: Following up on online inquiries within 1 hour was linked to nearly 7x higher lead qualification vs. waiting another hour.[1]

3 GROW & REFER | Existing customer relationships

Are we making the most of the relationships we've already built?

- Are we staying connected with existing and past customers?
- What additional needs could we genuinely help them meet?
- Are we earning and asking for referrals and introductions?

Our biggest opportunity:

RESEARCH: In studied settings, referred customers generated 31·57% more referrals than non-referred customers.[2]

HERE'S HOW IT ALL ADDS UP

Attract opportunities. Convert them. Grow relationships that bring new opportunities.

[1] HBR (2011), online lead qualification. [2] Journal of Marketing Research (2024/25), observed referral behavior.

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FOCUS YOUR NEXT 90 DAYS

You've explored the possibilities. Now choose where to focus your effort to make the greatest difference to profitable sales growth.

01 CHOOSE YOUR GREATEST OPPORTUNITY

Which avenue offers the greatest opportunity? Pick one.

- ☐ ATTRACT | Generate more qualified leads
- ☐ CONVERT | Turn more opportunities into customers
- ☐ GROW & REFER | Increase existing customer sales and referrals

02 ESTABLISH YOUR 90-DAY GOAL

What specific, measurable result do you want to achieve?

If you have a starting number, record it here: _____

03 IDENTIFY YOUR MOST IMPORTANT ACTION

What's the one action that, if done consistently, would make the greatest difference toward achieving your goal?

WHO OWNS IT? _____

FIRST 30-DAY MILESTONE _____

ONE OPPORTUNITY. ONE GOAL. ONE HIGH-IMPACT ACTION.