

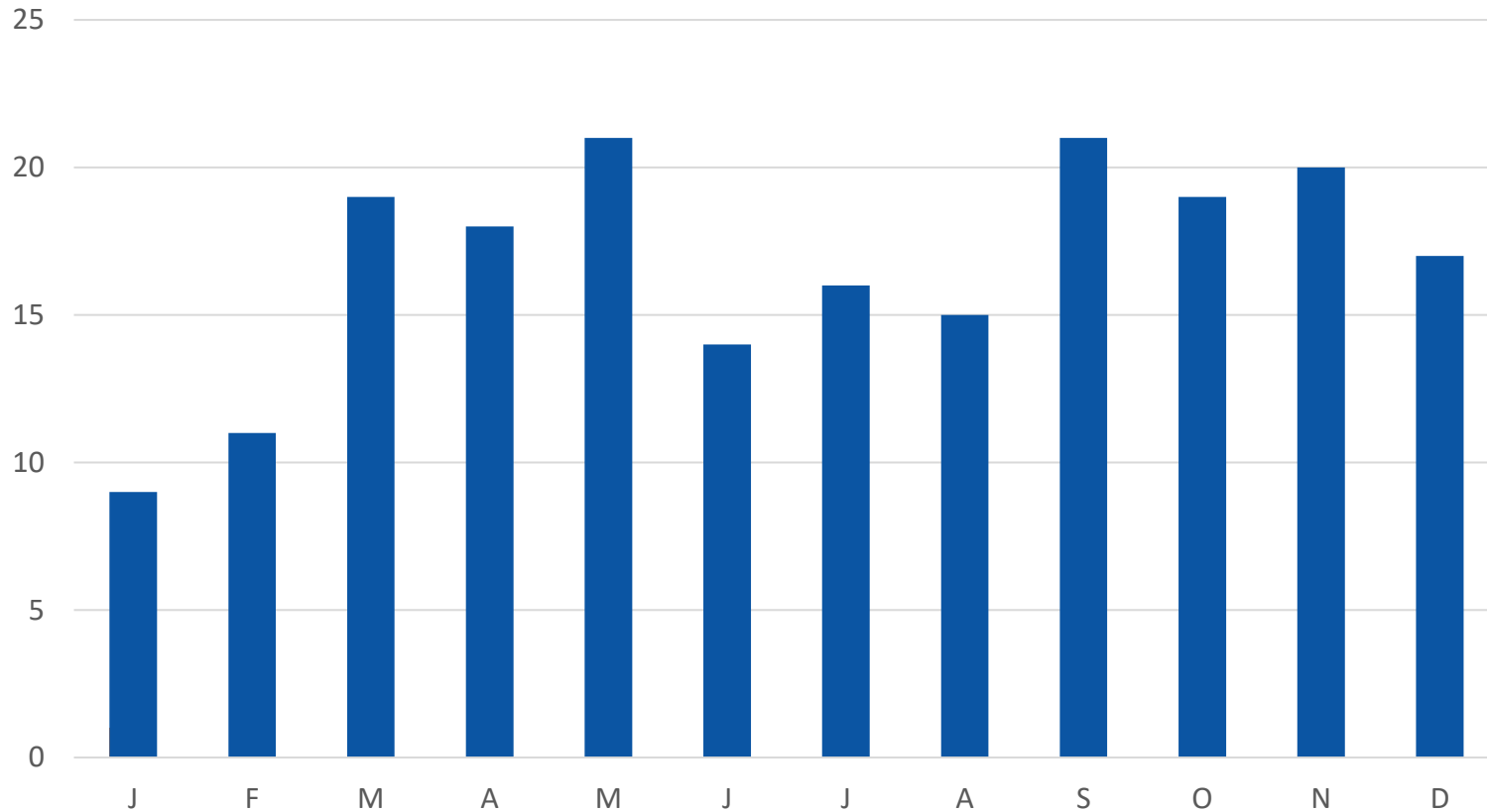
Session 1:

# Target Setting & Measurement

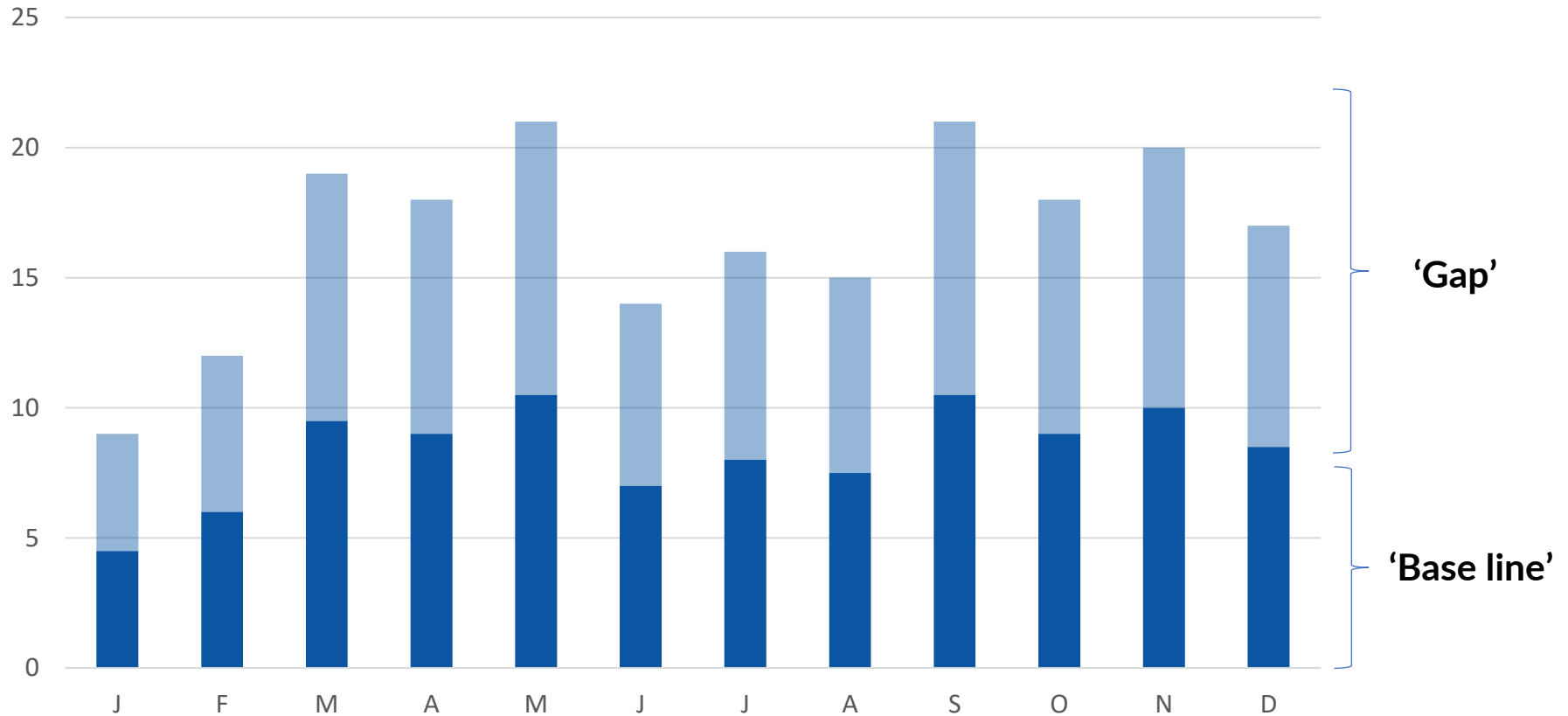
**Your 'current reality' has  
changed. How has this impacted  
your sales expectations and  
creating a 'Dashboard' to  
measure your performance.**

# Setting Your Targets

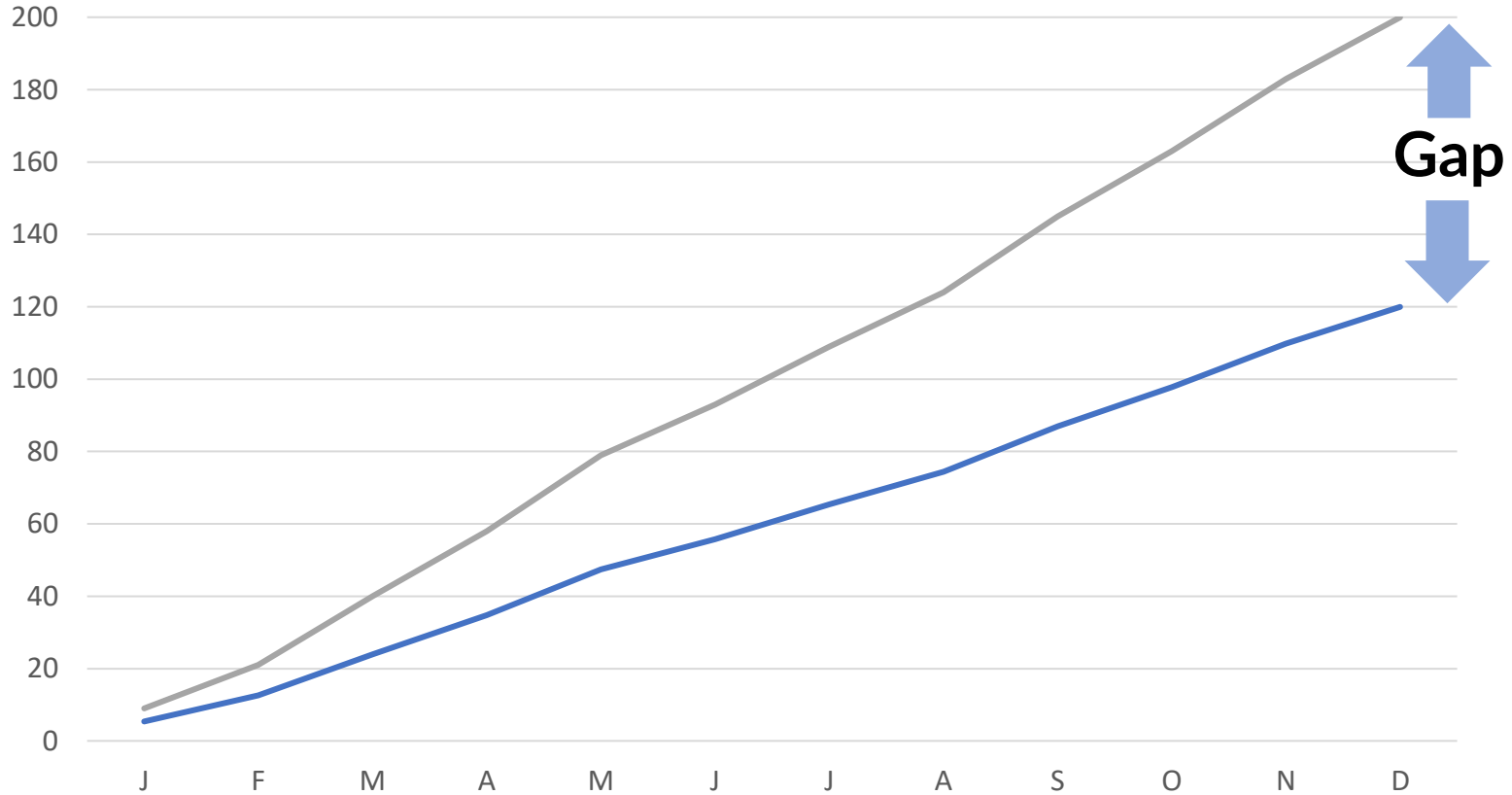
# Typical Monthly Forecast



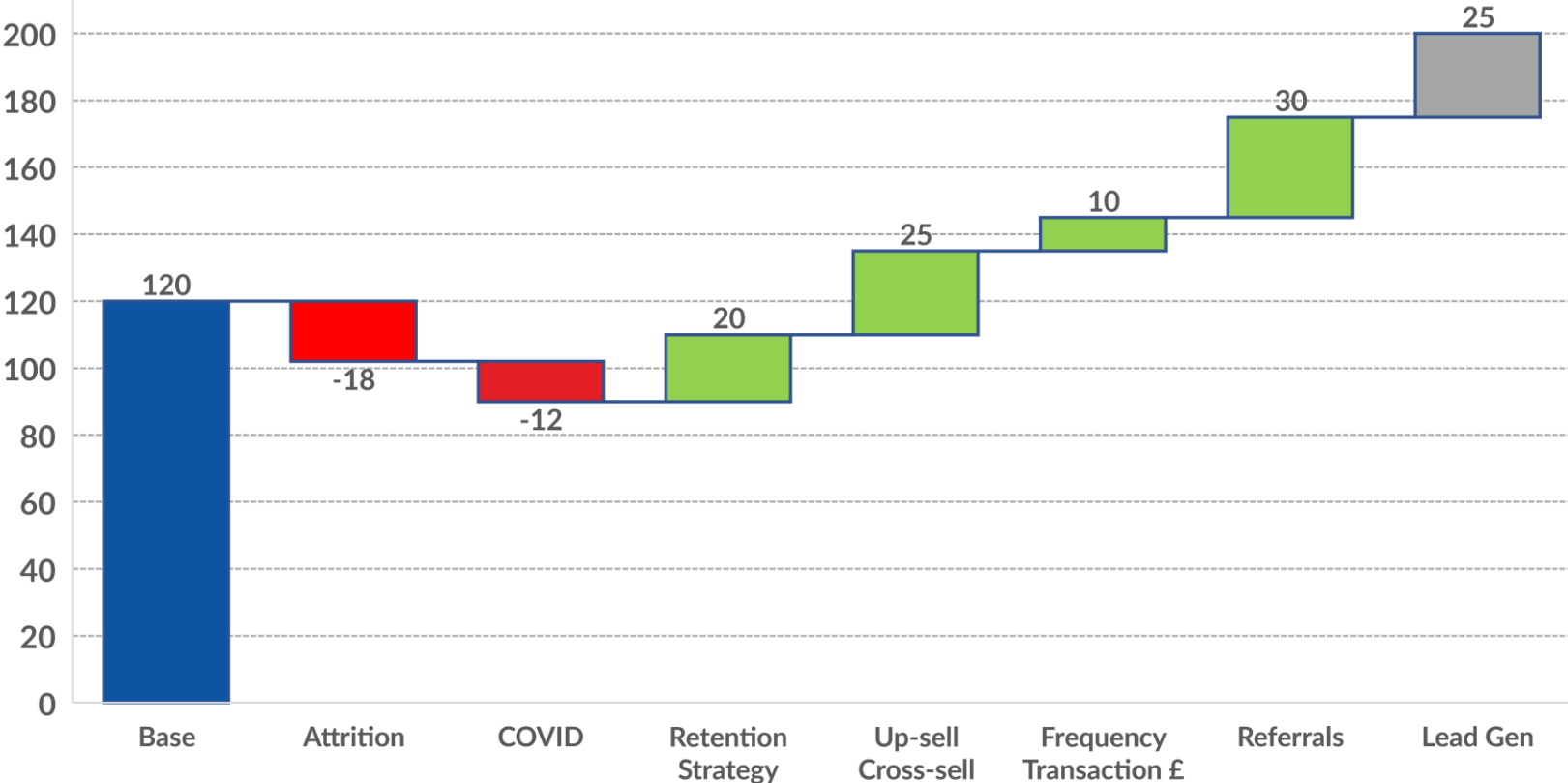
# Typical Monthly Forecast



# Cumulative Forecast

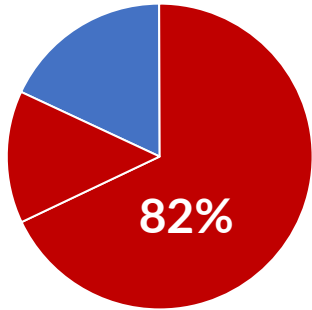


# Bringing certainty to the forecast



# Filling the Gap - Customer Relationships

'Reactivate'



Retention

Cross sell  
Upsell  
Frequency  
Transaction £  
LTV

Referred

4x more likely to purchase  
18% more loyal  
Spend 13% more

Lead Gen



Past

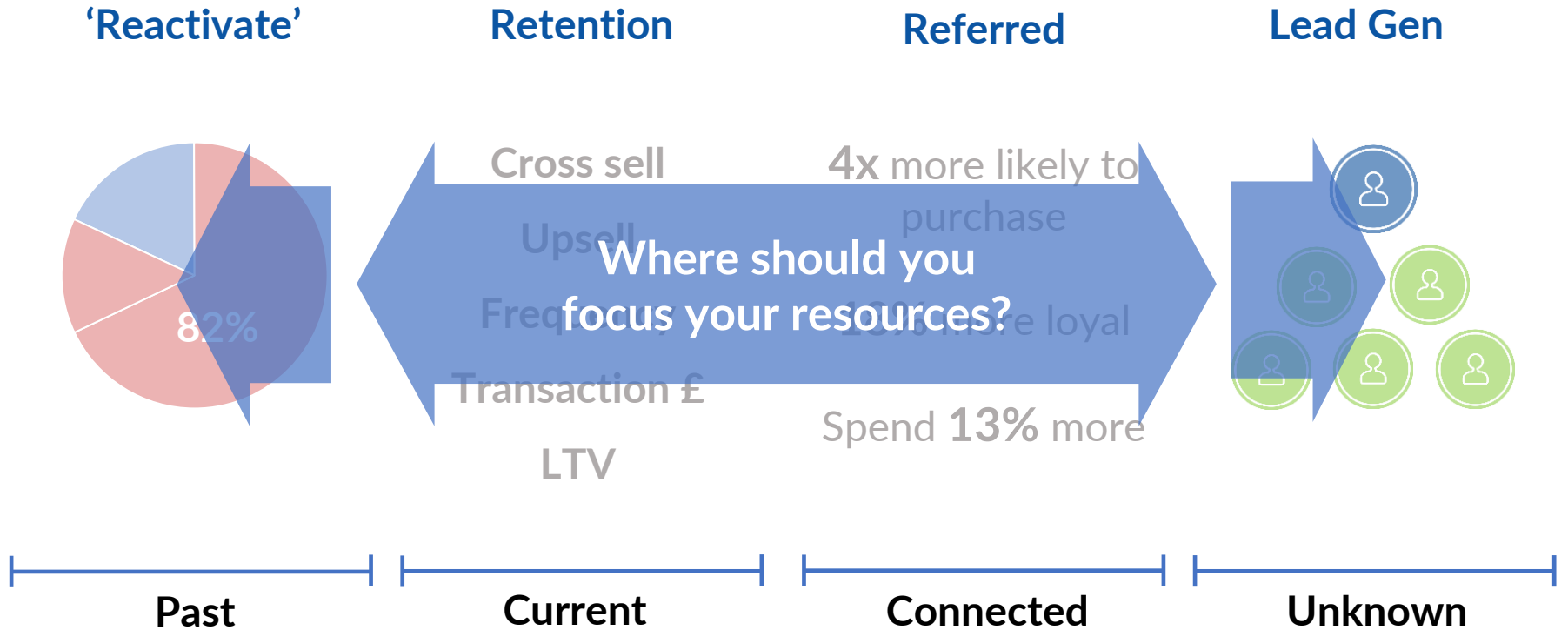
Current

Connected

Unknown



# Filling the Gap - Customer Relationships



**20%**

Customers are lost by the average UK business each year.

**95%**

Businesses fail to engage with customers who provide feedback.

**5-7x**

More costly to attract a new customer than to keep a current one.

# 9 Levers to build your business



**Leads**



**Conversion**



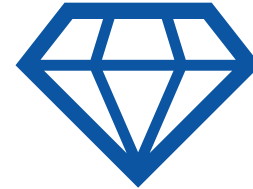
**Value**



**Margin**



**Frequency**



**Up-sell**



**Cross-Sell**



**Retention**



**Referrals**



# Lead Generation

**Initiation of consumer interest or enquiry into products or services of a business.**

- **What are your key lead sources?**
- **Do you generate good quality leads?**
- **What is your average cost per lead?**



# Conversion

**Process of turning a lead into an opportunity / deal, converting prospects into customers.**

- Do you the right sales collateral?**
- How do you evidence consistent delivery?**
- What is your cost per converted lead?**



# Transaction Value

**The price paid for the goods / services.**

- What is the average value of your initial sale?**
- How could you increase this value?**
- How flexible are your payment terms?**



# Profit Margin

The % made on each sale.

- Do you track your gross/net margin?
- How can you increase margins?
- What is the impact on reducing price?





# Frequency of purchase

**Average number of purchases made by over a defined period of time.**

- **How often do customers purchase?**
- **How often could they purchase?**
- **What can you do to increase frequency?**



# Up-selling

**The practice of encouraging customers to purchase a comparable higher-end product.**

- **Do you have an up-sell script?**
- **Do you have a range of offers?**
- **Do you have a ‘super premium’ option?**

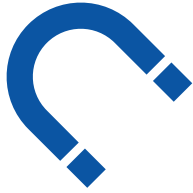


# Cross-Selling

Inviting customers to buy related or complementary items.

- Have you completed a 'gap analysis'?
- Is your offer clear / compelling?
- Do you have a cross-sell script?

Do you want  
fries with  
that?



# Customer Retention

**Ability to retain customers over a specified period.**

- **Do you know your annual attrition rate?**
- **How are engagement levels monitored?**
- **Do you have an engagement strategy?**



# Referrals

**The act of telling someone about the positive features of a business / product.**

- Have you defined your ‘ideal referral’?**
- Do you have a ‘referral process’ in place?**
- Do you have proactive referral partners?**



**Leads**



**Conversion**



**Value**



**Margin**



**Frequency**



**Up-sell**



**Cross-Sell**



**Retention**



**Referrals**

# Recommended Actions

1. **Build Your Forecast**
2. **Revenue Risk Assessment**
3. **Create Dashboard**
4. **Review Marketing Focus**

Session 1:

# Target Setting & Measurement