

## Five Steps for “Off the Grid” Sales Success

By Lance Cooper

Many entrepreneurs and high-activity salespeople get stuck in survival mode. They don't organize activities to establish a better, more stable way of living. They end up doing sales activities to provide for survival needs, such as mortgage payments, food and minimum debt payments. This earns them a high-tension, on-the-edge financial existence. Salespeople automatically default to activity levels that keep them eating, sleeping, communicating and traveling. As a result, they make subsistence, not ambitious lifestyle goals, their organizing focus. Today's matrix, or on-the-grid norm, then turns into selling to survive and not to prosper.

Other high-activity sales reps focus on the goals set by their sales managers. Sales quotas and resulting incomes typically reflect the company's minimum requirements, and not each rep's present or future needs. Reps do their duty, and though this is a commendable character trait in many settings, it obscures the future reality of their own sales and income goals and causes a lack of fiscal stewardship. Many sales reps get a high-five for their faithful service only to borrow money to pay for a new roof.

Even those with higher aspirations may work without aligning income, sales, activity levels and lifestyle requirements. In some cases, top salespeople pay little attention to where their money goes, and they don't work on a plan for a better lifestyle or future. They chase more money, more recognition, or faster advancement without anticipating what lies around the bend of the next accomplishment. Their list of achievements grows, but their quality of life suffers with more debt, higher credit card payments, wasteful expenditures and no safety net of savings. The stress and financial problems soon begin to burden these high achievers and their families.

Here are five steps that break this cycle and lead reps and their sales managers to greater productivity and prosperity.

1. Answer lifestyle questions. Imagine one year into your future; your life has improved because of the income you make and its uses at home. You're receiving the sales recognition you need. You're making an income that provides for more than your survival needs. Ask yourself what you did with your excess income. For example, did you reduce your debt? If so, by how much? Did your savings increase? Were there improvements with your home? How does life feel now? Why? What changed in the past year, specifically? Answering these and other similar planning questions prepares you to envision the future you want and to do the next steps.
2. Find out what it takes for you to survive. Calculate your default survival income and write down the monthly payments you must make just to keep from going backward. Add these up and arrive at your “Survival Number.” This monthly total will include: housing, utilities, fuel, credit card and loan payments, IRS and state taxes.
3. By answering the lifestyle planning questions in the first step, discover your “Better Lifestyle Number.” For example, if you want to reduce your debt by \$12,000 in 12 months, then you will need \$1000 additional per month above your Survival Number. If you want \$6,000 more

in savings by the next year, you will need to make \$500 per month for that purpose. Continue doing this with other dreams and the monthly requirements for them. Add them up and arrive at your “Better Lifestyle Number.”

4. You can now design a “Monthly Income Goal” that motivates you (yes, you, not your company, not your sales manager, but you). How do you do this? Add your Survival Number to your Better Lifestyle Number. When you do this, you will know what monthly income it will take to achieve your dreams. From this planning, you will receive a committed and directive energy that 90% of reps today do not have.
5. Take your monthly income goal and turn it into a monthly sales goal and its related sales activity levels. (If you need help, ask your sales manager) Determine how many sales you must make each month to achieve your monthly income goal. Using a conservative closing ratio, calculate how many quotes, presentations or proposals you will make. Next, know how many first appointments you will set and hold to get out the right amount of quotes, and the number of leads it will take each month to attain your appointment levels.

If competition and recognition drive you at this stage of your life, there is one additional step you must take. Find out what the top achievers are doing. If, after doing the five steps shown above, you find that your monthly sales goal needs to be adjusted higher to enter the top rankings, then adjust it up and plan how you will use the extra money for your future lifestyle.

These five steps prepare you for Off-the-Grid sales success. They focus you on your commitments, passions, needs and the activity levels it takes to achieve them. Rather than survival numbers, frenetic achievement or boring duty, your sales goal will now relate to your current and future fiscal needs.

You will sell beyond survival. You will achieve lifestyle goals or greatness and make them your daily focus. You will align your income, sales, activity levels and lifestyle requirements. Your passion will not depend on the goals of your company or your sales manager. As you grow in your achievements, your quality of life and financial condition will improve. You will replace misguided stresses as you provide for your family and those who need help around you. You will be a high-activity sales professional.

### **About the Author**

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