

Sales Activity Quota Template

Name	Description	Calculation	Amount
Weekly Activity per Rep (A)	Amount of desired calls, emails, appointments, or touch points completed per week	(A) = Desired weekly activity per Rep	Weekly # Activity per Rep
Monthly Activity per Rep (B)	Amount of desired calls, emails, appointments, or touch points completed per month	(B) = (A) * 4	Monthly # Activity per Rep
Quarterly Activity per Rep (C)	Amount of desired calls, emails, appointments, or touch points completed per quarter	(C) = (B) * 3	Quarterly # Activity per Rep
Annual Activity per Rep (D)	Amount of desired calls, emails, appointments, or touch points completed per year	(D) = (C) * 4	Annual # Activity per Rep
Total Sales Reps (E)	Total number of sales reps at your business	(E) = # of Sales Reps	# of Reps
Total Annual Activity (F)	Amount of total annual activity for all reps	(F) = (D) * (E)	# of Annual Activity of All Reps
Conversion Rate Sales Funnel Stage 1 (G)	Percentage of leads that go through the next stage of the sales funnel after activity is completed. Based on estimates or historical data.	(G) = Stage 1 conversion rate	%
Stage 1 Leads Converted (H)	Total annual leads converted to Stage 1	(H) = (F) * (G)	# of Leads
Conversion Rate Sales Funnel Stage 2 (I)	Percentage of leads that go through the next stage of the sales funnel after activity is completed. Based on estimates or historical data.	(I) = Stage 2 conversion rate	%
Stage 2 Leads Converted (J)	Total annual leads converted to Stage 2	(J) = (H) * (I)	# of Leads
-	Keep funneling leads until deals are closed	-	-
Deal Closing Rates (K)	Percentage of leads that go through the funnel and become paying customers	(K) = Closing rate	%
Deals Closed (L)	Total annual deals closed/customers created	(L) = (J) * (K)	# of Deals Closed
Average Revenue per Deal/ Customer (M)	Average amount of revenue generated per deal or customer. This is based on pricing estimates or historical data.	(M) = Avg. Revenue per Deal	\$ per Deal
Total Revenue Generated (N)	Total annual revenue generated	(N) = (L) * (M)	\$