OFFICIAL TEC DADDY PLANNER 2018

OFFICIAL

TEC DADDY PLANNER

Record-keeping, appointments, time-management, goal-setting, and planning for service technicians, salespeople, contractors, and anyone else wanting to live a more organized and productive life.

"Success is not a product of hard work. It takes as much hard work to fail as it does to succeed. Success is not a matter of luck or good timing. Success does not happen by accident. Success happens on purpose. Success is a result of planning followed by deliberate right action."

— Charlie Greer

HVAC Profit Boosters, Inc. Plumbing Profit Boosters Electrical Profit Boosters

13620 Brynwood Lane Fort Myers, FL 33912

1-800-963-4822 (US and Canada) 0011-1-239-454-1131 (International)

charlie@charliegreer.com www.charliegreer.com

For more great sales training for service technicians, salespeople, contractors, and CSRs, see our product pages in the back of this book.

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PERSONAL INFORMATION

GENERAL INFORMATION				
NAME				
ADDRESS				
CITY		STATE	ZIP	
PHONE	FAX	CELL		
COMPANY NAME				
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January 1: New Year's Day, January 15: Martin Lufter King Day, Pebruary 15: Presidents' Day, May 28: Memonal Day, July 4: Independence Day, September 3: Labor Day, October 8: Columbus Day, November 11: Voterans Day, November 12: Voterans Day (observed), November 22: Thankaping Day, December 25: On istmas Day

2019

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January 1: New Yoar's Day, January 21: Martin Luther King Day, February 18: Presidents' Day, May 21: Memorial Day,

July 4 Independence Day, September 2: Later Day, October 14. Columbus Day, November 11: Votobers Day, November 28: Thanks giving Day, December 25: Christmas Day

HOW TO USE THIS PLANNER:

- Log your appointments as they happen. There's plenty of space for you to list whatever information you feel would be helpful about the customer, what you sold or quoted on that call, and for how much.
- 2. Circle the dollar amounts of items that were purchased by your customers for a quick and easy visual reference.
- 3. If you're planning on following up, make a note on when you plan to follow up, then go to that date in the Planner, and make an appointment with yourself to follow-up with that customer. (In that entry, I usually reference the date of the earlier contact.)
- 4. Complete the totals at the bottom of the page at the end of every day.

Abbreviations:

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WTD = Week-to-Date
MTD = Month-to-Date
YTD = Year-to-Date
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5. Complete the Annual Summary for the appropriate month at the end of each month.

Notes:

CALLS # is the total number of all calls you've run during a given period CLOSING % is # SALES ÷ # CALLS X 100

AVERAGE/CALL \$ is the SALES \$ ÷ CALLS #

AVERAGE/SALE \$ is SALES \$ ÷ SALES #

NOTES:

- Maintain a constant awareness of your average per call and your average per day. Never quote anyone less than your average/call.
- Set a minimum dollar amount of sales you plan to make per day.
- The key is **COMMITMENT!** If you commit to running calls on any individual day until you hit your goal, you'll find that you'll hit it well before quitting time, no matter what type of calls they dispatch to you.

2018 ANNUAL SUMMARY

TOTAL													
DEC													
NOV													
DCT													
SEP													
AUG													
JUL													
NOL													
MAY													
APR													
MAR													
FEB													
JAN													
	MONTHLY CALLS #:	MONTHLY SALES #:	MONTHLY CLOSING %:	MONTHLY SALES TOTAL \$:	MONTHLY AVERAGE/CALL \$:	MONTHLY AVERAGE/SALE \$:	WORK DAYS/MONTH #:	MONTHLY AVERAGE/DAY \$:	YTD CALLS TOTAL #:	YTD SALES TOTAL #:	YTD CLOSING %:	YTD SALES TOTAL \$:	YTD AVERAGE/CALL \$:

People want things done right. They know that they're not going to get the highest quality product, with the highest level of service for the lowest price.

— Charlie Greer

MONDAY, DEC 25	TUESDAY, DEC 26	WEDNESDAY, DEC 27
7	7	7
8	8	8
9	9	9
40	40	40
10	10	10
<u> </u>	11	11
12	12	12
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2	2	2
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4	4	4
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Christmas Day		

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12	12	12
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6	6	SUNDAY, DEC 31
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		New Year's Eve

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You don't make sales with razzle-dazzle or fancy sales techniques. You make sales by delivering a superior level of service.

— Charlie Greer

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11	11	11
12	12	12
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New Year's Day		

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11	11	11
12	12	12
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6	6	SUNDAY, JAN 7
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Whenever you're proposing something, make sure you land them on the "sense of urgency", which is the reason to take action now.

— Charlie Greer

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Salesmanship is not about answering questions or educating the consumer. Salesmanship is about closing.

- Charlie Greer

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Never recommend a customer buy anything that you wouldn't buy yourself if you were in their position.

— Charlie Greer

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Avoid repeating yourself. Once you've made your point, everytime you repeat yourself, you lose a point. — Charlie Greer

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