Yearly-to-weekly sales worksheet

LoftyBiz 163 — Turn a Yearly Goal Into a Weekly Number: Simple Sales Math for New Owners

These are examples, not promises. The people and businesses in this video are illustrative examples, and results vary. Example figures, not targets or forecasts. This is general business education, not financial, legal or tax advice.

The steps

1. Start with a yearly goal above break-even.
2. Split the year by season, so quiet weeks do not surprise you.
3. Turn money into sales with your average order.
4. Turn sales into conversations with your win rate.
5. If you sell monthly services, count clients and plan for the ones who leave.
6. Pick one weekly number you can control, write it where you will see it every Monday, and check it every Friday.
7. Make sure you can deliver the work as the number grows, including hiring if you will need help.
8. Keep that page in Systex, our own product.

Write your weekly number this week

1. Write your yearly goal.
2. Write your break-even, so you can see that the goal sits above it.
3. Split the year into busy, normal and quiet weeks if your year is not even.
4. Divide by your average sale to get the number of sales you need.
5. Use your win rate to turn that into conversations, quotes or consultations.
6. Divide by your working weeks, and write that one number where you will see it every Monday.
7. Every Friday, check the number and decide what you will do next week.

Worked example: Georgina, Tulsa

Step	What Georgina did (example figures)	Your note
Yearly goal above break-even	Goal: 156,000 dollars in sales. Break-even about 2,200 dollars a week. The goal sat above break-even.	
Split the year by season	Divide by 52 = 3,000 dollars a week. Busy weeks about 4,200 (forty percent more), normal 3,000, quiet 1,800 (forty percent less).	
Money into sales	Average order about 500 dollars. Normal week about six orders, busy eight or nine, quiet about four.	
Sales into conversations	Won about one quote in every two, so twelve quotes a week. That became her weekly number: twelve quotes sent.	
Monday and Friday	Wrote the number every Monday and checked it every Friday. If only eight quotes by Wednesday, she called before the week ended. When the average order slipped below 450 dollars, she reviewed prices and packages.	
After six months (example)	Slightly ahead in busy weeks and slightly behind in quiet ones. She knew it each week, not at the end of the year. She later kept the Monday target and Friday review in Systex.	

Worked example only: Georgina, event and office florist, Tulsa (USA). Example figures, not targets or forecasts. These are examples, not promises. Results vary.

Worked example: Anand, Sacramento

Step	What Anand did (example figures)	Your note
Count clients, not only dollars	Monthly fee about 400 dollars. Fifteen clients, goal sixty by year end.	
Plan for clients who leave	Lost about one client in every six, so he planned to lose about ten and needed fifty-five new clients, not forty-five.	
Turn the goal into conversations	Just over one new client a week. One in four consultations became a client, so four or five consultations a week. About half who enquired booked a consultation, so about nine enquiries a week.	

Step	What Anand did (example figures)	Your note
The weekly number he could control	Consultations. If enquiries were low, he asked for introductions. If consultations were not becoming clients, he looked at his proposal and follow-up.	
Capacity	Sixty clients was more than he could serve alone. He planned to hire a part-time assistant at thirty-five clients, and set aside time each week to train.	
By year end (example)	Forty-eight clients, not sixty. Enquiries were lower in summer. He saw the gap in July, not in December, and had time to act. He later kept those weekly-number notes in Systex.	

Worked example only: Anand, bookkeeping practice, Sacramento (USA). Example figures, not targets or forecasts. These are examples, not promises. Results vary.

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