



2020 Sales Funnel Worksheet

Name: _____



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With your 2020 calendar and production figures, fill in the following numbers:

Number of In-Person Sales Calls (New Prospects)

**Number of In-Person Sales Calls
(Existing Customers)**

Total Number of Packages Received

Total Number of Proposals/Term Sheets Issued

Total Number of Closed Deals

Dollar Value of Closed Deals

Average Dollar of Closed Deals

Conversion Ratio 1: Appointments to Packages

**Conversation Ratio 2: Packages to
Proposals/Term Sheets**

**Conversion Ratio 3: Proposals/Term Sheets to
Closed Deals**

What did you discover about your 2020 activities and production?

What actions will you take to make 2021 more productive?

Questions: Call Ray Adler at 760-720-9270