

**Sales Activity Quota Template**

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| **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) | $ |