

Success Planning Worksheet

Operation Capacity

$$\boxed{} = \frac{}{\text{Total Available Hours}} \times \frac{}{\text{\# of Ops Personnel}} \div \frac{}{\text{Hours to Produce 1 Unit}}$$

Maximum Capacity for your Business

$$\boxed{} = \frac{}{\text{Maximum Capacity}} \times \frac{}{\text{Average Price per Unit}}$$

Total Potential Revenue that can Be generated monthly

$$\boxed{} = \frac{}{\text{Annual Available Hours}} \times \frac{}{\text{Average Hourly Pay}} \times \frac{}{\text{Employee Cost Factor}}$$

Cost to Add Additional Operational Resources

Sales Capacity

$$\boxed{} = \frac{}{\text{\# Closed Deals}} \div \frac{}{\text{\# Proposals & Quotes}}$$

Close Percentage

$$\boxed{} = \frac{}{\text{Total Revenue}} \div \frac{}{\text{\# Closed Deals}}$$

Average Revenue Per Sale

$$\boxed{} = \frac{}{\text{\# Proposals \& Quotes}} \times \frac{}{\text{Average Hours per Sale}}$$

Time Spent Selling

$$\boxed{} = \frac{}{\text{Annual Available Hours}} \times \frac{}{\text{Hourly Rate}} \times \frac{}{\text{Employee Cost Factor}}$$

Cost to Add Additional Sales Revenue

$$\boxed{} = \frac{}{\text{Additional Resource Cost}} \div 52 \text{ weeks} \times \frac{}{\text{Time to Close 1 Sale}}$$

Cost Before One Sale is Realized

Marketing Capacity

$$\boxed{} = \frac{}{\text{\# weeks in period}} \times \frac{}{\text{Leads in a week}} \div \frac{}{\text{Proposal}}$$

Lead Effectiveness

$$\boxed{} = \frac{}{\text{Hours spent marketing}} \times 12 \text{ Months}$$

Current Time Spent Marketing

$$\boxed{} = \frac{}{\text{\# Leads per Week}} \times 52 \text{ Weeks} \div \frac{}{\text{Time spent Marketing}}$$

Marketing Efficiency

$$\boxed{} = \frac{}{\text{Annual Available Hours}} \times \frac{}{\text{Hourly Marketing Rate}} \times \frac{}{\text{Employee Cost Factor}}$$

Cost to Add Additional Marketing Resources



Have a question? Call Us!
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