



Score What Matters: Measuring the Right Sales Activity

Presented by Craig Lowder
NavSTAR Client Acquisition® System

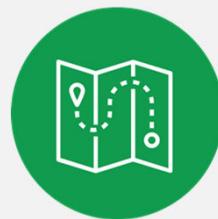
How many touchpoints do you make each week?

Today's Goal



Build a **Lead Conversion Success Scorecard** that:

- Tracks high-impact behaviors
- Helps you spot early warning signs
- Keeps you focused and consistent



What is a ‘Lead Conversion Success Scorecard’?

The Six Stars

NavSTAR Client Acquisition® System

Targeting

Focus on prospects that are right-fit for you.



Messaging

Develop messages that resonate deeply with your target audience.



Lead Conversion Process Mapping

Map out the journey from lead to client and optimize your client acquisition process for peak efficiency and effectiveness.



Lead Conversion Success Scorecard

Measure your progress and fine-tune your system with precise success metrics.



Lead Generation

Attract a regular flow of potential right-fit clients.



Feed the Funnel

Nurture leads to ensure a continuous stream of new right-fit clients.



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What is a ‘Lead Conversion Success Scorecard’?



Lead Conversion Success Scorecard =
a simple tracking system for key daily,
weekly and monthly activities that drive
‘right-fit’ client acquisition.

Inputs vs. Outputs

Inputs vs. Outputs



Inputs:

Outreaches,
Leads Generated,
Meetings Booked,
Proposals Sent

Outputs:

Revenue,
Closed Deals,
New Accounts,
Personal Income

The 4 Core Lead Conversion Metrics

The 4 Core Metrics



- 1. New Conversations** (Are you opening new doors?)
- 2. Discovery Meetings** (Are you learning what matters?)
- 3. Proposals Delivered** (Are you offering real solutions?)
- 4. Deals & New Accounts Closed** (Are people saying yes?)



Case Study: Susie
*Sales Rep for Custom
Metal CNC Parts*

6-Month Average Monthly Impact	Before	After	% Change
Average # F2F Sales Calls	11	23	↑ 109%
Average # of Quotes	15	31	↑ 106%
average # of orders	1	7	↑ 656%
Average \$ order size	\$9,138	\$42,413	↑ 364%
Lead Conversion Rate	7%	20%	↑ 185%
Net Personal Income	\$146,000	\$251,000	↑ 72%

How to Use a Scorecard

How to Use a Scorecard



1. Establish Scorecard Metrics
2. Set weekly activity & result targets
3. Review progress EOB every Friday
4. Adjust targets based on conversion rates

What activities did you
complete this week
before your best, ‘right-
fit’ client said **yes**?

Avoid ‘Vanity’ Metrics

*i.e. Social media likes, Newsletter opens,
Event registrations (without follow-up)*

Scorecard Template Preview



Activity Type | Target | Actuals
= Conversion Rate

Common Scorecard Mistakes

Tracking too many metrics.

Not updating regularly.

Confusing effort with progress.

Homework

Build your basic scorecard.

Track weekly activity volume, conversion percentages, and where sales are stalling out.

Final Thoughts

What gets measured gets improved.
But only if you measure the right things.

[illegible]

**Want the done-for-you
success scorecard?**
Get the NavSTAR Client
Acquisition® System Bundle





Questions!