

# Income Planner

**Instructions:** Use this tool to set and calculate your revenue goals, determine your sales targets, and break down your annual objectives into achievable steps. Follow each step carefully to ensure accurate calculations.

## Step 1: Target Annual Revenue Goal

Input your target revenue for the year.

## Step 2: Divide into Quarterly and Monthly Goals

This divides your annual revenue target into manageable quarterly and monthly goals to keep you on track.

Quarterly Goal:

Monthly Goal:

## Step 3: Set Average Opportunity Size

Enter the average revenue you generate from each closed deal (e.g., \$50,000). This will be used to calculate how many deals are required to meet your revenue target.

Input your Average Opportunity Size:

## Step 4: How Many Opportunities Needed to Close

Divide your Annual Revenue Target by the Average Opportunity Size. This shows how many deals you need to close within the year to achieve your revenue target.

Opportunities Needed to Close:

## Step 5: Determine Your Close Rate

Enter your close rate as a percentage. To find your close rate, divide the number of deals won by the total number of opportunities.

Input Deals Won:

/ Input Total Deals:

Close Rate:

## Step 6: Number of Opportunities Needed to Meet Target

This field calculates how many opportunities you need to generate based on your close rate. For example, if your close rate is 25%, you'll need four opportunities to close one deal.

Total Opportunities Needed to Meet Target:

## Step 7: Average Decision-Making Timeline

Enter the typical number of days it takes for a buyer to make a decision in your business. This helps you plan prospecting activities throughout the year to ensure a steady pipeline.

Input your Average Decision Timeline in Days: