Practice Activity

Plan Your Perfect Day

Objective:   
Help you plan an efficient and productive day by allocating typical sales tasks to the most appropriate times.

# Instructions:



**Allocate Each Task to Morning, Afternoon, or Late Afternoon:**Schedule your tasks based on your peak productivity times and the nature of each task.

**Review the**

**Task List:**Understand the   
typical tasks you need to complete in a day.

**Reflect on Your Choices**

**and Include Breaks:**Ensure you have a balanced schedule that includes necessary breaks.

Task List:

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| Prospecting  Calls Reaching out to potential clients to generate leads. | Follow-up  Emails Sending emails to follow up with clients and prospects. | Client  Meetings Engaging with clients in meetings to discuss their needs and solutions. | Administrative Work Handling paperwork, scheduling, and other administrative tasks. |
| Lunch  Break Taking a break to recharge. | **Planning and Strategy** Setting goals, planning your activities, and strategizing your approach. | **Team Collaboration** Working with your team on projects and sharing information. | **Personal Development** Investing time in learning and improving your skills. |

# Example Schedule:

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| Morning  (8:00 AM - 12:00 PM) | Afternoon  (12:00 PM - 3:00 PM) | Late Afternoon  (3:00 PM - 5:00 PM) |
| Prospecting Calls  Planning and Strategy | Client Meetings  Follow-up Emails | Administrative Work  Personal Development |

# Create Your Schedule:

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| Morning (8:00 AM - 12:00 PM) |
| **Prospecting Calls:**  Why: Mornings are often the best time to reach clients when they are most receptive.  Task 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Planning and Strategy:**  Why: Planning your day early helps set a clear direction and priorities.  Task 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| Afternoon (12:00 PM - 3:00 PM) |
| **Client Meetings:**  Why: Early afternoons are suitable for engaging with clients when both parties are alert but not rushed.  Task 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Follow-up Emails:**  Why: Post-meeting follow-ups can be handled right after discussions to keep momentum.  Task 4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| Late Afternoon (3:00 PM - 5:00 PM) |
| **Administrative Work:**  Why: These tasks can be less demanding mentally and are suitable for the end of the day.  Task 5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Personal Development:**  Why: Use this time for self-improvement when you can reflect on the day's learning.  Task 6: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |