



***Goal Setting Role Play Notes
“The Underperforming or Comfortable Rep”***

Steve: How much money do you want to target this year?

David: How much did I make last year?

Steve: \$73,000

David: If I can maintain that, I would be thrilled!

Goal: Ascertain if David doesn't want to work harder to increase his income, or if he is afraid that the business just isn't out there.

Steve: Why do you say that? Wouldn't you like to increase your income level?

David: Yes – but I already know all the businesses in my territory and I'm not sure that there's enough new business opportunities out there to increase sales.

Steve: Well, your territory generated just barely enough revenue last year to break even. The business needs to see some growth in your territory to support an ongoing investment there. Obviously, it doesn't make sense from a business standpoint to plan for a break-even situation, so how would you feel about working with me to come up with some ways to increase you own personal income, and the profitability of the territory at the same time?

Note: We are focusing on a collaborative approach to improve the profitability of the territory, and increase David's personal income. We the “The territory did this...” not “David, you only sold enough to break even...”

David: I'm not sure I can work any harder than I worked last year.

Steve: “How about if we focus on working smarter? Let's talk about ways to:

1. Increase the average order sizes in your territory,
2. Sell more products to accounts who have a history of placing big orders,
3. Sell to some new accounts

Let's work through some possible scenarios...”

Goal: By working through some goal setting scenarios, make the logical case that a \$100,000 income level is attainable with a reasonable level of increased activity.

If David still resists in setting higher activity goals that are reasonable and attainable, and will result in David earning more money, then you may have identified that David is “comfortable” earning at his present income level, and you may have to take some form of corrective action.