



2024 New Year Checklist

A new year is upon you. That means not only a fresh start, but also starting the year at ZERO with an uphill climb to hitting your quota. Now's a great time to take inventory as you enter 2024!

- Start with a clean pipeline.** Close deals as lost if they are a “no” or NRN (not right now). Let's take our rose-colored glasses off to start the year.
- Review what worked well in 2023.** As sales professionals we spend most of our time rehashing what went wrong and never writing down what went right so we have strategies to use when we're struggling to close deals. Take time to think about all the deals you closed last year and what activity or skill impacted those wins.
- Create a personal strength strategy to hit your quota.** Hopefully you are aware of your Sales Superpowers and Secret Weapons. Take time to think about how you'll leverage those to ensure you'll be able to hit your quota in 2024.
- Create a Closed/Lost Campaign.** Setup a process for nurturing your closed/lost deals from 2023. Those NRNs might just be 2024's saving grace.
- Create a formal referral strategy.** Where do you get your best referrals? Happy customers. How are you leveraging your relationship with customers you've sold in the past to create abundance in the future?
- Develop your personal brand.** People buy from people. Does your online presence tell your prospects and customers that you're an expert in your field? Are you creating original content to post on LinkedIn or are you just “liking” what your company posts? Now's the time to work on your personal branding. Chances are you won't be at your current job a year from now, so make sure you have a network that will follow you to your next role.
- Block time for professional development.** Top performing athletes (and some who aren't) wouldn't dream of getting out on the court or field without having spent hours practicing for the big matchup. So, why are you doing discovery calls and demos without so much as writing your questions down ahead of time and running through them with your dog?

Here are the areas you need to be working on throughout the year:

- **Industry trends.** How are they impacting your product/service?
- **Product knowledge.** Did your company release or update a product you're selling?
- **Competitors.** Who are the new players? Did the usual suspects release any new features/functions/products on which you need to be up to speed?
- **Soft-skill sales training.** There's a good chance your company and sales leader hasn't picked a sales methodology for the team to follow or even so much as



provided you formal negotiation training, so you're on your own to learn and continue to improve those skills.

- Join a networking group.** Do you belong to your local industry association and attend chapter meetings? What about a mastermind group? Commit to becoming a joiner so that you can expand your network and your skillset.
- Make time for personal development.** Top Ten Percenters know that the work to get to the top doesn't take place at work. It takes place after work. Getting exercise. Eating healthy. Having a spiritual practice. Saying affirmations or affirmations out loud. Visualizing success.
- Check out new tools to help you be more efficient.** I know your company's tech stack is already out of control. Nonetheless, assess how YOU work and determine if there are tools that might help you save time, better analyze what's working, or make it easier for you to create more content to promote your personal brand.
- Celebrate your successes.** You should be your #1 cheerleader! Make sure that you stop to celebrate all the successes in 2024 - big and small. Closed that BIG deal? Celebrate. Got a NRN from a prospect you've been chasing for 6 months? That's a win....a "No" is better than a maybe.

Cheers!