ACT! Goals

Installation and Usage

ACT! Goals helps you track your daily, monthly and yearly performance relative to your targets for activities that lead directly to revenue.

ACT! helps us manage our tasks and activities by providing tools to schedule activities, display task lists and calendars, and keep a history of what we have done. It does very little, however, to help us set goals or track how we are performing against those goals.

ACT! Goals fills that void, by providing a mechanism to set an annual revenue goal, and to assign numeric values to various types of activities that are know to contribute directly to revenue. Then, by keeping an accurate record in ACT! of activities performed, ACT! Goals reports how realistic that revenue goal is, based on activity levels.

Installation

1. Shut down all running programs.
2. Run **Install_ACTGoals.exe**.
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will install **c:\program files\tnhg\ ACTGoals.exe** on your hard-drive, and add the ACTGoals.exe program as an ACT! custom command. It will also put the ACT! Goals icon  on the Contacts View toolbar and the Groups View toolbar.

Usage

Preparation

ACT! Goal Setting is designed to assist you in reaching your income goal. In order for ACT! Goals to work, you must be diligent about scheduling activities and then subsequently recording the results of those activities by clearing them. ACT! Goals calculates the totals for the various types of activities and you assign point values to each activity type in order to track your progress.

If you have been lax in either scheduling or clearing activities, take some time to update your database. First clear any past activities:

1. Open the **Task List** in ACT!
2. Click the **Dates to show** drop-down and select **All Dates**.
3. Make sure the other filter settings are correct. Include all types of activities. If you are on a shared database, click **Select Users** and make sure that only your name is selected from the list.
4. Work through the list of past activities and **Clear** them as appropriate.

If you have activities that you know occurred but never made it into ACT! you can add them:

1. **Lookup** the contact record.
2. Open the **Contact** menu.
3. Select **Record History**.
4. Enter the correct date and other details of the activity.

With that done, you can next run an ACT! report to determine a baseline of activities.

1. Open the **Reports** menu
2. Select **History Summary Classic**
3. Select **All contacts**
4. Select **Preview** to view the Report on screen
5. (If you are on a shared database, click Selected Users and click on your name.)
6. Click the **Activities/Notes/Histories** tab
7. Choose a **Date range** that works. The easiest way might be to select **Current Year**. You will understand why in a moment.
8. Click **OK** to run the report.
   The results can be many pages depending upon what time of year it is and how diligently you use ACT! for your activities.
9. Open the drop down next to **Page** and select last page. At the bottom, ACT! calculates the totals for Attempted Calls, Completed Calls, Meeting Held and Letters Sent. Click **Zoom In** to read the numbers. You can jot down the numbers or Click the Print button and in the printer dialog box, enter the number that is the last page and print it.

With this data in hand, you can get a rough idea of the number of activities you undertook in order to generate the income you have earned year to date (if you selected Current Year as the data range.) One activity that is missing is the number of emails sent. ACT! does not generate a report that shows this number.

The next step is to decide which type of and how much of each activity was responsible for generating your income. For example, if you are a real estate agent and want to make $50,000 this year you must do a number of things. Meetings with buyers and sellers likely are the best chance for you to make a commission. However, to get a single meeting, you might have to make 50 *completed* phone calls. So, if you close 50% of your face-to-face meetings and the average commission is $10,000, a single meeting is worth $5,000. If it takes 50 phone calls to get that one meeting to happen, each phone call is worth $100. In addition, you have to factor in emails and letters and various To-dos as part of the mix. There is not a perfect way to come up with the point allocation. You will have to adjust the goals for each activity as you gain feedback. You might also benefit from watching what the top salespeople are doing to earn their income. If phone call prospecting is the best way to get meeting versus email, you might have to factor that in to your plans.

Setup

With ACT! Goals installed and your activities as up-to-date as you can get them, start the program.

There are two tabs on the program dialog. The **Progress** tab will display your actually results versus the goals you have set. The **Settings** tab is where you enter the data that drives the goals.

1. Click the **Settings** Tab
2. Enter the **Target Gross income** you want to earn. This number is considered to be an annual amount.
3. Under **Calls**, enter a point value for each type of Call activity. In the example of the realtor, 50 **completed** calls were needed to get a meeting. You have to judge the point values of other meeting types.
4. Enter a value for **Meetings Held** for the average return on a meeting. If you had 10 meetings and made 5 sales at $5,000 per sale, that would mean each meeting is worth $2,500.
5. Under **To-dos,** again decide what contribution each activity makes toward the income goal.

Note: ACT! Goals can only generate a number for Emails Sent that originated in ACT!.

6. In the **Weeks** worked per year, enter the correct number based on vacation time etc.
7. Under **Days** per week, enter the number you work. A real estate agent might work 6 or 7 days while most business-to-business salespeople normally work 5 days.
8. Click **Apply.**
9. Click the **Progress** tab.
10. Click the **ReCalc** button.

ACT! Goals combs your database and shows you your progress toward your income by Today, This Week, This Month and This Year. You might be surprised at the results.

Ongoing daily usage

At the end of every day, clear all of your scheduled activities and record any History that was not scheduled as closely as possible. Then, start **ACT! Goals** and click the **ReCalc** button. If you are way over or under based on the point values you entered, adjust them as needed. You now can see how closely your actual activity matches what is needed to reach your revenue goal!