

# Sales Action Plan

## Step Three: Defining the key employees that will help in the process

Identify those in the bank that will help you accomplish your goals and what role they will play.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_

## Step Four: Create your "milk route"

Now that you have identified who you are going to go after, you need to have a way to go get them. Depending on your role with the bank, a "milk route" could be something as simple as making a few phone calls and sending personalized notes to developing an out-of-office calling plan to get out of the bank and see the customer and/or prospects on a regular basis.

	Week 1	Week 2	Week 3	Week 4
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				