

THE 90-DAY QUOTA PLAYBOOK

Asset Pack

8 printable tools · one page each

Print these. Write on them. That's the point.

8 printable tools

Each asset is exactly one page — meant to be printed and kept next to a monitor.

1	Quota Math Worksheet	Module 0
2	Cold Call Opener Card	Module 2
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Quota Math Worksheet

MY NUMBER

Quota (per quarter): \$ _____

Average deal size: \$ _____

Average cycle time (days): _____

WORKING BACKWARD

STEP	FORMULA	YOUR NUMBER
Deals needed	quota ÷ deal size	_____
Win rate (last 2 quarters)	—	_____
Opportunities needed	deals ÷ win rate	_____
Meeting→opp rate	—	_____
Meetings needed	opps ÷ meeting→opp rate	_____
Conversation→meeting rate	—	_____
Conversations needed	meetings ÷ that rate	_____
Touches per conversation	—	_____

MY DAILY NUMBER

STEP	FORMULA	YOUR NUMBER
Total touches needed	conversations × touches	_____
Per week	÷ 13	_____
Per day	÷ 5	_____

MY DIAGNOSIS

The one thing that's broken: _____

The module I'm working: _____

The rate I'm moving: from _____ % to _____ %

I'll judge this on (date, ≥ one cycle time from today): _____

More calls is the last lever, not the first.

Cold Call Opener Card

1 "Hi — is this [Name]?"

→ wait for the yes

2 "[Name], my name's ____, I'm with ____."

→ half-second pause. Do not rush.

3 "I'll be straight with you: this is a cold call. Do you want to hang up, or can I have thirty seconds to tell you why I picked up the phone?"

→ **STOP TALKING.** Count to three.

4 "Appreciate it. I work with [role]s at [company type], and the pattern I keep running into is [problem], usually because [cause]. It ends up costing them [consequence]."

→ pause · keep this under 30 seconds

5 "Does any of that sound like your world, or am I way off?"

→ **STOP TALKING.** This is the most important silence of the call.

6 "That's helpful — thanks for being straight with me. Makes sense to put fifteen minutes on the calendar to see whether this is even relevant? I'll come prepared, and if it's not a fit I'll say so."

IF THEY SAY:

THEY SAY	YOU SAY
"Go ahead."	"Appreciate it." → line 4
"What's this about?"	"Fair question —" → line 4
"Not interested."	"That's fair — you don't know what I do yet. Can I give you one sentence, and if it's not for you, I'll never call again?"

TONE Slow down · drop your pitch at the end of sentences · smile on line 3 · stand up · never apologize.

Voicemail Script Card

THE VOICEMAIL

"Hi [Name], it's ____ at _____. Calling about [specific problem] — it's the thing I keep hearing from [role]s at [company type]. I'll try you again [day] morning."

THE SIX WORDS THAT MATTER

"I'll try you again Thursday morning."

WHY

It removes the ask entirely, sets a real expectation, and — critically — you then actually call. Doing what you said you'd do is a competence signal before you've spoken a word to them.

WHEN YOU CALL BACK, REFERENCE IT

"[Name], ____ again — said I'd try you Thursday."

NEVER

- "Give me a call back" — asks a stranger to do work for you
- "Sorry to bother you" — tells them the call wasn't worth making
- Any voicemail over 20 seconds

THE GATEKEEPER ASK

"Hi — I'm hoping you can point me in the right direction. I'm trying to figure out who owns [problem area] over there. Is that [Name], or would it be someone else?"

Ask for direction, not access. Never claim a relationship you don't have.

5-Touch Sequence Map

TOUCH	DAY	CHANNEL	THE JOB
1	Day 1	Call + voicemail + email, same day	Announce the problem. Get on the radar.
2	Day 3	Email	Deliver something useful. No ask.
3	Day 5	Call + LinkedIn	Different time of day than touch 1
4	Day 8	Email	Peer proof — most replies land here
5	Day 10	Call + email	The honest close-out

RULES

- Vary the time of day. Unreachable at 9am is often reachable at 4:30pm.
- Same-day call and email on touch 1. Neither works as well alone.
- Never send a touch that only serves you. No “just checking in.”
- Ten business days, then out. Move to nurture, re-enter on a new trigger.

THE LINKEDIN TOUCH (NEVER A PITCH)

“[Name] — reached out on [trigger]. No pitch, just wanted to be a name you recognize rather than a random number.”

TRACK THIS

- Reply rate by touch number → are you quitting early?
- Reply rate by template → which message works?
- Connect rate by time of day → when are your people reachable?

Most reps believe they run five touches and actually average two. Count them.

The 4 Cold Email Templates

1 · FIRST TOUCH (DAY 1)

Subject: [their trigger, 3–5 words]

[Name] —
Saw [specific trigger].
When that happens, the thing I usually hear from [role]s is [problem], normally because [cause].
Costs teams around [consequence].
Worth fifteen minutes to see if that's your situation too? If it's not, I'll leave you alone.

2 · THE VALUE TOUCH (DAY 3)

Subject: the [X] thing

[Name] — no ask here.
Most [role]s dealing with [problem] get stuck on [sub-problem]. The teams that fix it usually [one concrete insight].
Might be useful whether or not we ever talk.

3 · PEER PROOF (DAY 8) — HIGHEST REPLY RATE

Subject: how [similar company type] handled this

[Name] —
[Company type like theirs] had the same thing: [problem]. They were [old approach], which broke once [threshold].
They changed [one specific thing] and got [specific result].
Happy to walk through exactly how, or ignore this and I'll stop.

4 · CLOSE-OUT (DAY 10)

Subject: closing the loop

[Name] — I've reached out a few times and haven't heard back, which usually means one of three things: not a priority, not the right person, or terrible timing.
Any of those is fine — just tell me which and I'll act accordingly.
Otherwise I'll assume it's not a priority and leave it there.

RE-ENTRY

- **No-show (send within 20 min):** "Looks like we got crossed up. Happens. Does [day, time] work better, or should I try you next month?"
- **Mid-deal ghost:** "I'm guessing something bigger landed on your desk. Should I close this out for now and check back in [month], or is it still live?"
- **Best re-entry:** a new first touch on a new trigger. Never reference the old silence.

Discovery Call Framework

OPEN — LABEL THE PLAN

"I've got four or five things I want to understand so I don't waste your time with a generic demo — and stop me whenever."

☐ 1 · TRIGGER

"What made you take this call?"

Real answer = a specific recent event. Vague answer = pain isn't owned.

☐ 2 · COST

"How are you handling [problem] today?"

"And what's that costing you — time, money, or people?"

→ \$/hrs: _____

Push for a number. Do the arithmetic out loud.

☐ 3 · CRITERIA

"If you were going to solve this, what would you need to see to be confident it's the right call?"

"Which of those matters most?"

→ _____

☐ 4 · PATH

"Walk me through how a decision like this usually gets made. Who else weighs in?"

"And what does [that person] care about most?"

→ 2nd name: _____

☐ 5 · TIMING

"What's driving the timing on your end?"

"And if this doesn't get solved this quarter, what happens?"

"Nothing" = nice-to-have. Price at full, forecast at zero.

☐ CONFIRM BACK — IN THEIR WORDS

"Let me make sure I've got this. Trigger was X. Costing roughly Y. You'd need A and B, A matters more. [Name] weighs in and cares about Z. If it slips past [quarter], W happens. Anything I got wrong?"

☐ CLOSE — next step with a date, a purpose, and a named person

An unticked box is a follow-up to make, not a proposal to send.

Deal Review Checklist

#	THE QUESTION	DEAL A	DEAL B	DEAL C	DEAL D
1	Can I state their trigger in one sentence, in their words?	☐	☐	☐	☐
2	Do I have a number for what the problem costs them?	☐	☐	☐	☐
3	Do I know their decision criteria, in priority order?	☐	☐	☐	☐
4	Have I spoken to more than one person?	☐	☐	☐	☐
5	Do I know the approval path — procurement, legal, finance?	☐	☐	☐	☐
6	Is there a consequence to them doing nothing?	☐	☐	☐	☐
7	Is there a next step on the calendar, with a date and a purpose?	☐	☐	☐	☐
	SCORE / 7	_____	_____	_____	_____

SCORING

- **6–7** → Real. Forecast it.
- **4–5** → Known gap. Write the gap, fix it this week.
- **3 or below** → Not a deal, a conversation. Out of the forecast.

THE THREE DEATH SIGNALS

- 1 Momentum is entirely one-directional — nothing happens unless you push it
- 2 The next step keeps softening — Thursday → next week → a few weeks
- 3 New people stop appearing — you and one contact, indefinitely

THE KILL SCRIPT

“[Name], I want to be direct — I don’t think this happens this quarter, and I don’t want to keep showing up in your inbox pretending otherwise. Should we close it out and revisit when [condition]?”

Forecast Confidence Scorecard

DEAL	SCORE /7	BIGGEST GAP	ACTION THIS WEEK	OWN-MONEY ODDS

THE QUESTION THAT SETS THE LAST COLUMN

Would I bet my own money that this closes this quarter? If no — what's the one thing I'd need to see to change that answer, and can I get it this week?

THE FORECAST LANGUAGE

"Committed: A and B — both at 6 or 7, next steps calendared. Best case: C, missing the approval path, working it this week. I've pulled D — single-threaded, no consequence to inaction. I'd rather tell you now than in week 12."

WHY THIS WORKS

A rep who removes their own deals before being asked gets believed about the ones they keep. That credibility is worth more over a year than any single deal you propped up.

NEVER move a deal to committed because it's the last week of the quarter and you need it to be. The math doesn't care what you need.