



EXPERIENCE

Action & Accountability Guide

PHIL PUTNEY



ADVISORS
EXCEL



FROM IDEAS TO ACTIONS

1		1		1
2				
3		2		
4				
5		3		
6		4		
7				
8		5		
9				
10		6		
11		7		
12				
13		8		
14		9		
15		10		
16				
17		11		
18		12		
19				
20		13		
21		14		
22				
23		15		
24				
25				



GOALS

SHORT TERM

1.	4.
2.	5.
3.	6.

LONG TERM

1.	4.
2.	5.
3.	6.

WHY?

1.	4.
2.	5.
3.	6.



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To know how many 1st appointments you need to maintain throughout 2020 so you're not just IMAGINING your goals, all it takes is a little calculating!

Total Asset Goal For 2020: \$ _____

of Weeks Planned to Work in 2020: _____ weeks

Avg. # of 1st Appts to Acquire New Client _____ 1st appts

Current Avg/ New Client Account: \$ _____



Now that you've got those figures, all you have to do is some simple math!

DETERMINE TOTAL NEW CLIENTS FOR 2020:

$$\begin{array}{r} \$ \underline{\hspace{2cm}} \\ \text{Total Asset Goal} \end{array} \div \begin{array}{r} \$ \underline{\hspace{2cm}} \\ \text{Current Average New Account} \end{array} = \begin{array}{r} \underline{\hspace{2cm}} \\ \text{New Clients Needed} \end{array}$$

DETERMINE TOTAL NUMBER of 1st APPOINTMENTS IN 2020

$$\begin{array}{r} \# \underline{\hspace{2cm}} \\ \text{New Clients Needed} \end{array} \times \begin{array}{r} \# \underline{\hspace{2cm}} \\ \text{Avg \# of 1st Appts to Acquire New Clients} \end{array} = \begin{array}{r} \underline{\hspace{2cm}} \\ \text{1st Appointments for 2020} \end{array}$$

DETERMINE TOTAL NUMBER of 1st APPOINTMENTS PER WEEK FOR 2020

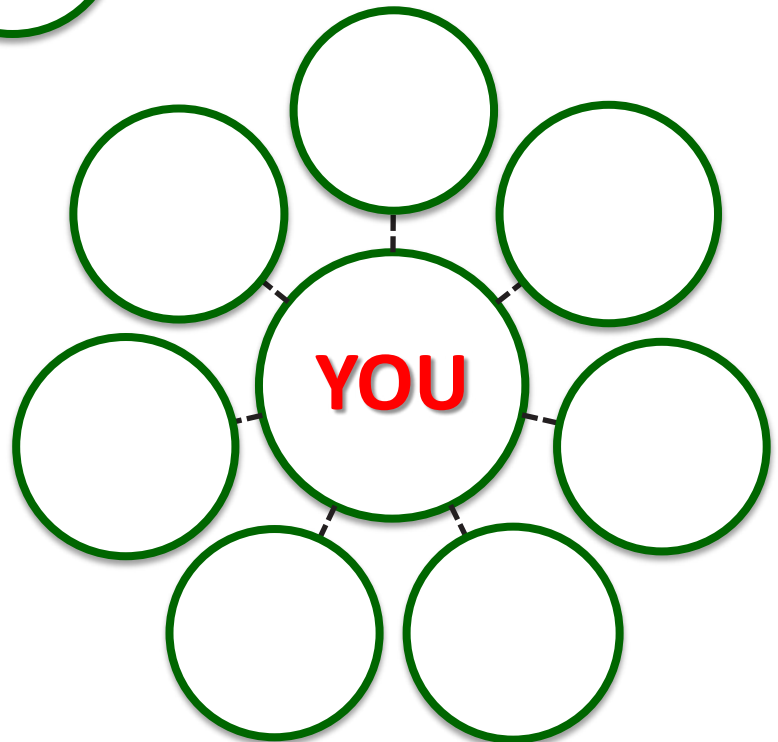
$$\begin{array}{r} \# \underline{\hspace{2cm}} \\ \text{Total 1st Appts for 2020} \end{array} \div \begin{array}{r} \# \underline{\hspace{2cm}} \\ \text{Work Weeks in 2020} \end{array} = \begin{array}{r} \underline{\hspace{2cm}} \\ \text{1st Appts Needed per Week} \end{array}$$



NEXT 12 MONTHS MARKETING PLAN

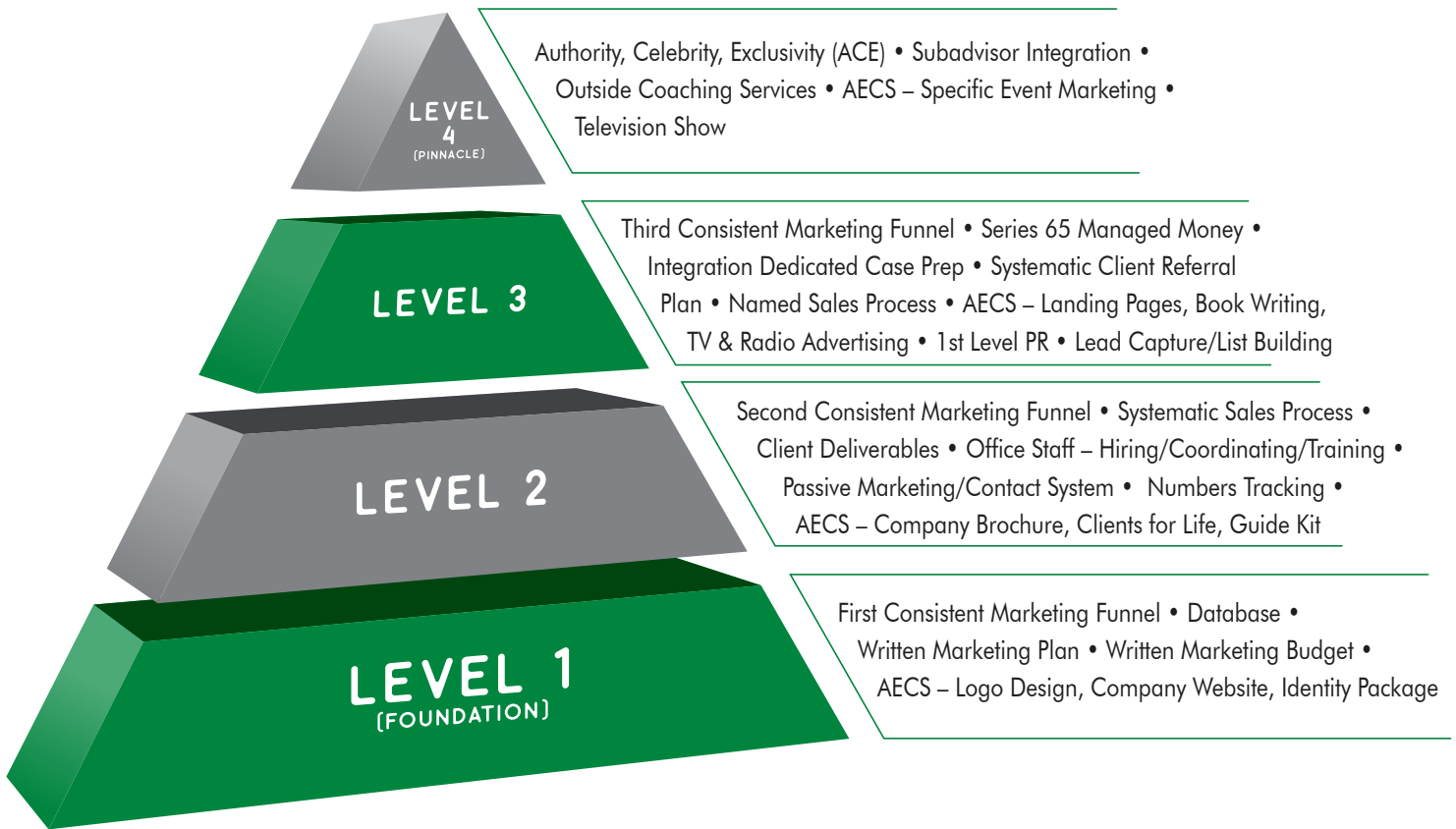
MARKETING FUNNEL	# OF EVENTS/TIMES EXECUTED	# OF NEW APPOINTMENTS	COST PER EVENT	ANNUAL BUDGET
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____
	TOTAL NEW APPOINTMENTS	_____	TOTAL ANNUAL BUDGET	_____

A TRUE MARKETING WHEEL



MARKETING MATRIX

	New Lead Generation	Existing Client Marketing
Active Strategies	<ul style="list-style-type: none"> Seminars White Glove Workshops Sponsored Seminars Radio Show TV Show College Classes Niche Markets 	<ul style="list-style-type: none"> Appreciation Events <i>(Entire database, bring-a-friend, VIP, etc.)</i> Informational Events Double Dates Birthday Parties Ambassador Event
Passive Strategies	<ul style="list-style-type: none"> Weekly E-Newsletter Buy or Die Mailers Landing Page Advertising Radio Advertisements TV Commercials Website Social Media PR/Celebrity Billboards 	<ul style="list-style-type: none"> Hard Copy Newsletter A+ Client Process Birthday/Anniversary Cards Birthday Cakes Referral Program Red Carpet Letters Holiday Cards Welcome Kit Holiday Pies



THE BUILDING BLOCKS TO GROWING A FINANCIAL ADVISOR FIRM ON A STRONG FOUNDATION



12 MONTH IMPLEMENTATION PLAN

IMMEDIATE IMPLEMENTATION

1. _____

3. _____

2. _____

4. _____

Top 3 Initiatives for Company in 2020

Focus on only these 3 things. Implement these first before moving to next initiatives.

Initiative/Task

Responsibility

Date

1. _____

2. _____

3. _____



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RESOURCES



KNOW YOUR NUMBER

Annuity Premium (\$ _____) x 7% Commission = \$ _____ per year
 + AUM Revenue \$ _____
 + Life Revenue \$ _____
 TOTAL REVENUE \$ _____

_____ / _____ hours/year = _____ per hour

REVENUE ACTIVITIES

1.

2.

Current Time Spent Weekly: _____

ITEMS TO DELEGATE – CURRENT TIME SPENT

1. Paperwork/Applications: _____

5. Technology/Systems: _____

2. Follow-ups: _____

6. Appointment Setting: _____

3. Marketing: _____
(Seminar prep, Radio prep, Drip marketing, Client Event prep)

7. Staff Management: _____

4. Case Prep/Design: _____

8. Client Service: _____
(Phone calls, Emails)



CALENDAR OPTIMIZATION

MON

TUES

WED

THURS

FRI

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VIP CLIENT GALA