



EXPERIENCE

Action & Accountability Guide

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ADVISORS
EXCEL



FROM IDEAS TO ACTIONS

1		1		1	
2					
3		2			
4					
5		3			
6		4		2	
7					
8		5			
9					
10		6			
11		7		3	
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 2021 so you're not just IMAGINING your goals, all it takes is a little calculating!

Total Asset Goal For 2021: \$ _____

of Weeks Planned to Work in 2021: _____ weeks

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

Current Avg/ New Client Account: \$ _____



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

DETERMINE TOTAL NEW CLIENTS FOR 2021:

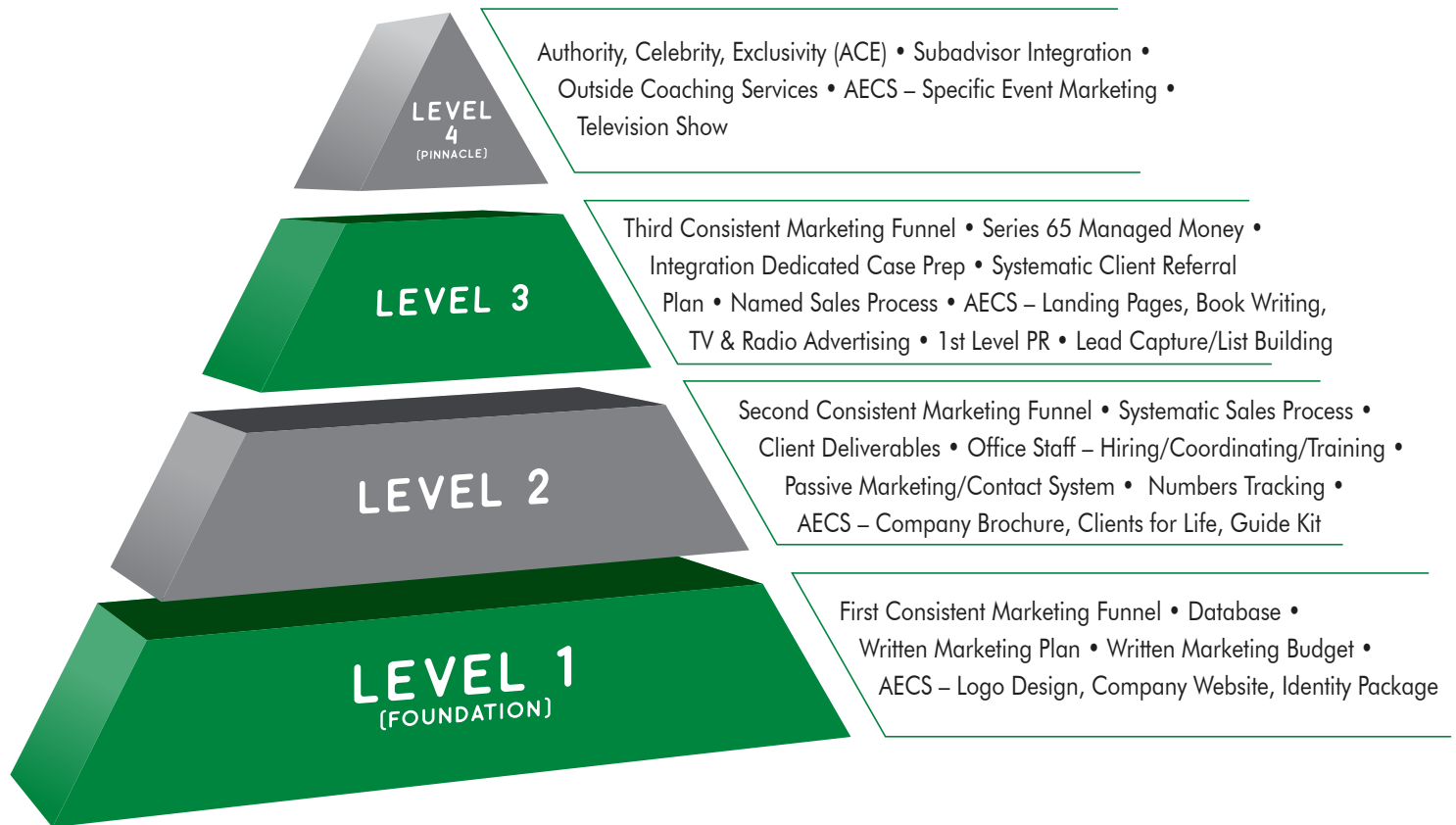
$$\begin{array}{ccccc} \$ & \underline{\hspace{2cm}} & \div & \$ & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} \\ & \text{Total Asset Goal} & & \text{Current Average New Account} & & & \text{New Clients Needed} \end{array}$$

DETERMINE TOTAL NUMBER of 1st APPOINTMENTS IN 2021

$$\begin{array}{ccccc} \# & \underline{\hspace{2cm}} & \times & \# & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} \\ & \text{New Clients Needed} & & \text{Avg \# of 1st Appts to Acquire New Clients} & & & \text{1st Appointments for 2021} \end{array}$$

DETERMINE TOTAL NUMBER of 1st APPOINTMENTS PER WEEK FOR 2021

$$\begin{array}{ccccc} \# & \underline{\hspace{2cm}} & \div & \# & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} \\ & \text{Total 1st Appts for 2021} & & \text{Work Weeks in 2021} & & & \text{1st Appts Needed per Week} \end{array}$$



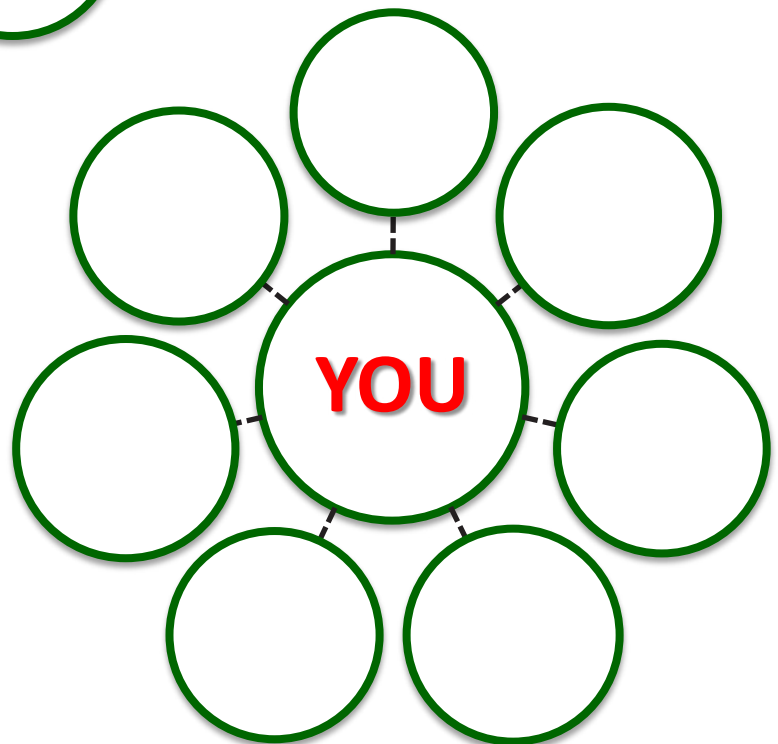
THE BUILDING BLOCKS TO GROWING A FINANCIAL ADVISOR FIRM ON A STRONG FOUNDATION



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">SeminarsWhite Glove WorkshopsSponsored SeminarsRadio ShowTV ShowCollege ClassesNiche Markets	<ul style="list-style-type: none">Appreciation Events <i>(Entire database, bring-a-friend, VIP, etc.)</i>Informational EventsDouble DatesBirthday PartiesAmbassador Event
Passive Strategies	<ul style="list-style-type: none">Weekly E-NewsletterBuy or Die MailersLanding Page AdvertisingRadio AdvertisementsTV CommercialsWebsiteSocial MediaPR/CelebrityBillboards	<ul style="list-style-type: none">Hard Copy NewsletterA+ Client ProcessBirthday/Anniversary CardsBirthday CakesReferral ProgramRed Carpet LettersHoliday CardsWelcome KitHoliday Pies



12 MONTH IMPLEMENTATION PLAN

IMMEDIATE IMPLEMENTATION

1. _____

3. _____

2. _____

4. _____

Top 3 Initiatives for Company in 2021

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 **EXPERIENCE**