Welcome to The Grow My Profit Business Optimizer!

Here's how to use this performance improvement tool to increase your productivity and personal income faster than you ever thought possible:

1. Click "FILE" at the top, select "MAKE A COPY", name the file and save it so you can edit your own copy online OR select "Download" and then "Microsoft Excel" file to save it to your hard drive

2. Complete the Business Assessment by clicking on the "Business Assessment" tab at the bottom of the page

3. After completing the Assessment, review the "Business Assessment Results" tab and see where you need additional coaching and support to help you improve your business and achieve your personal goals and dreams.

4. Each of the following tabs address the Six Steps to Scale 2-10x in 3-5 years. Use these sections to help you leverage the coaching resources available. Return back to this Business Optimizer on a regular basis to continue your improvement in each of the six categories and re-take the Business Assessment to see your professional growth and development.

5. For additional coaching support please visit www.GrowMyProfit.com to learn more.

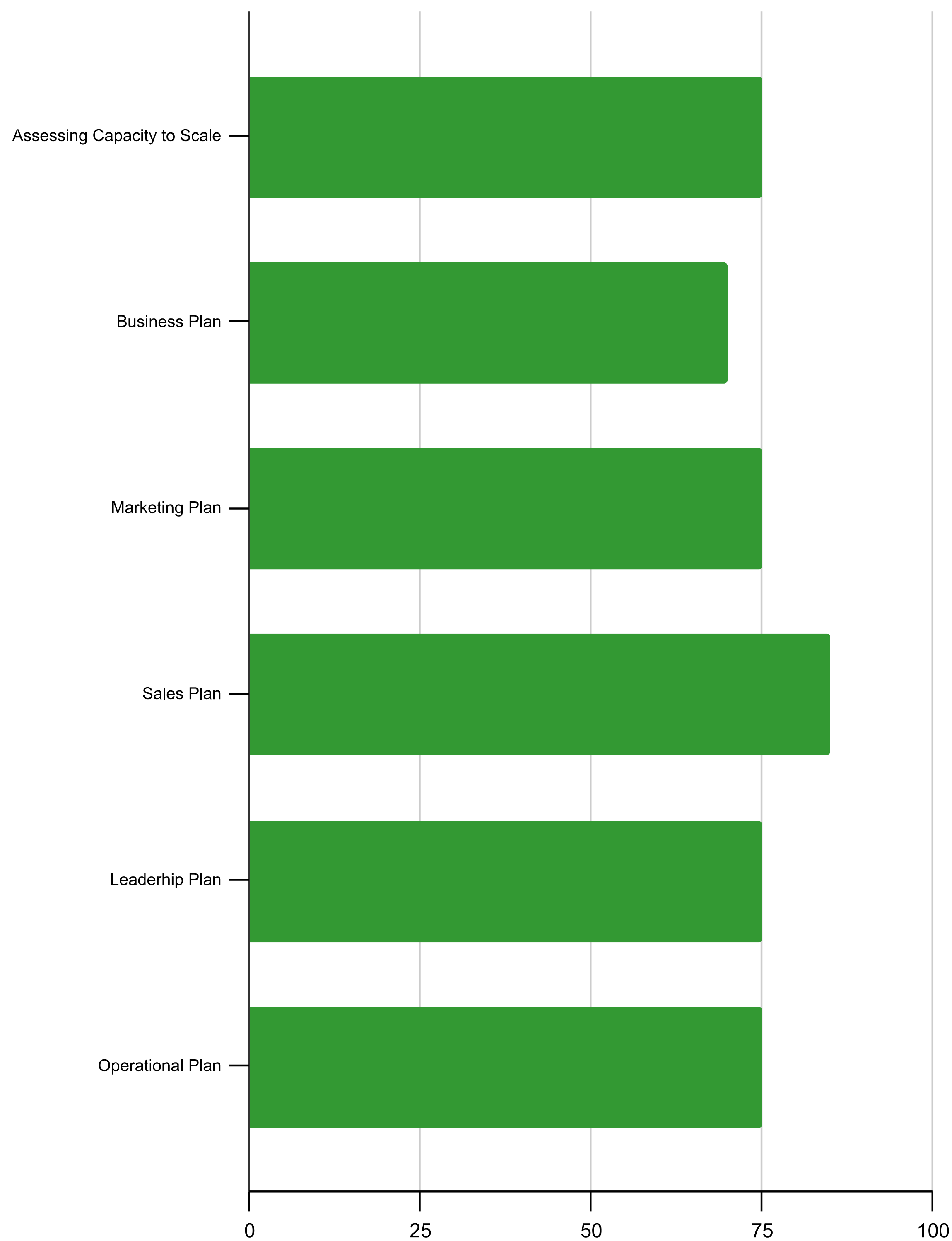
Click On The Coaching Tabs Below Now!

Business Assessment

How well is your coaching business performing? Take a moment and reflect on how you're doing in each of the Six Core Business Categories. **Grade yourself in each category and then click on the "Business Assessment Results" tab at the bottom of the page.**

Core Business Categories	Grade Yourself 10 = I'm Failing 100 = I'm Perfect	Assessment Scoring System Defined
Assessing Capacity to Scale	75	100 = We are fully capable of scaling 2-10x in the next 3-5 years. We have the motivation, mindset, skillset and people in place to make it happen.
Business Plan	70	100 = We have a clear understanding of our vision, mission and purpose. We also have a written plan for our business to fulfill this vision, mission and purpose and we're on target to achieve it.
Marketing Plan	75	100 = We have a written Marketing Plan that includes a successful marketing system for Lead Generation, In-Process added value opportunities and referral requests as well as ongoing relationship building strategies for strategic business partnerships. We also have a Client Retention program as part of our Customer Relationship Management System that helps us to keep in contact with clients. We're very satisfied with amount of incoming leads and feedback that I'm receiving from our marketing.
Sales Plan	85	100 = We are proficient in problem identification, presenting solutions in an easy to understand manner for clients and referral sources and we have memorized scripts to overcome objections and close the sale. We have a working system for following up on all incoming leads and prospective referral sources and we are satisfied with our overall sales abilities. We have implemented a time management system that allows us to focus on our most important priorities each day.
Leaderhip Plan	75	100 = We have a strong leadership development plan in place to grow transactionally and transformationally with the business as it grows.
Operational Plan	75	100 = We have standard processes and procedures in place and in writing to ensure a consistent delivery of Raving Fan customer service and to manage our operational systems effectively. Every person who works on our team has a written job description and we have delegated the areas that are not part of our unique talents, skills and abilities to others so we stay focused on our highest payoff activities. We have the necessary tools, systems and resources needed to accomplish our plan and achieve goals efficiently and effectively.

Once Completed Please Click on the "Business Assessment Results" Tab Below!


Assessing Capacity to Scale
Business Plan
Marketing Plan
Sales Plan
Leaderhip Plan
Operational Plan
0
25
50
75
100

MY LIFE PLAN

In this section identify your dreams (or long term goals) for each of the 8 life categories along with the due date and priority level.

CAREER DREAMS/GOALS

Dream/Goal	Due Date	Priority
Enter your life dreams and goals here	insert due date here	A, B, or C

EDUCATION/PERSONAL DEVELOPMENT DREAMS/GOALS

Dream/Goal	Due Date	Priority

FAMILY/RELATIONSHIP DREAMS/GOALS

Dream/Goal	Due Date	Priority

FINANCIAL DREAMS/GOALS

Dream/Goal	Due Date	Priority

HEALTH AND FITNESS DREAMS/GOALS

Dream/Goal	Due Date	Priority

PLEASURE/LEISURE DREAMS/GOALS

Dream/Goal	Due Date	Priority

PUBLIC SERVICE/LEGACY DREAMS/GOALS

Dream/Goal	Due Date	Priority

SPIRITUAL DREAMS/GOALS

Dream/Goal	Due Date	Priority

MISSION STATEMENT

(Answer questions below and then create a short 1 paragraph summary mission sentence here)

EXAMPLE:
Our mission at XYZ Company is to provide accessible and affordable healthcare solutions to underserved communities, guided by our core values of compassion, integrity, and innovation. We aim to address the healthcare disparities present in low-income areas by offering quality medical services and preventive care initiatives. Through strategic partnerships with local organizations and community outreach programs, we strive to make a positive impact on the well-being of individuals and families. Our commitment to transparency, accountability, and patient-centered care drives every decision we make, as we work towards a future where everyone has equal access to healthcare services and opportunities for a healthier life.

QUESTION:	YOUR ANSWERS
1. What is the core purpose of your business beyond making a profit?	
2. What values and principles guide your business operations and decision-making processes?	
3. Who are the primary beneficiaries or stakeholders of your business's products or services?	
4. What specific needs or problems does your business aim to address in the market?	
5. How does your business contribute to the betterment of society or the community it serves?	
6. What sets your business apart from competitors in terms of its mission and impact?	
7. What long-term goals or objectives does your business aspire to achieve?	
8. How do you envision your business making a positive difference in the lives of its customers or clients?	
9. What legacy do you hope your business will leave behind in its industry or field?	
10. How do you plan to uphold your mission statement in all aspects of your business operations, from hiring practices to product development and customer service?	
11. What is the driving force or inspiration behind your business's mission?	
12. How do you measure success beyond financial metrics, in alignment with your mission statement?	
13. How do you ensure transparency and accountability in fulfilling your business's mission to stakeholders?	
14. How do you communicate your mission effectively to employees, customers, investors, and the broader public?	
15. How do you adapt your mission statement to evolving market conditions and societal needs while staying true to your core values?	

5 YEAR VISION STATEMENT

(Answer questions below and then create a short 1 paragraph summary vision statement here in the present tense).

Our business is steadily increasing its revenue and profitability with X locations, X team members, $ in annual revenue, capturing a significant market share, expanding our product or service offerings to meet evolving customer needs, planning to enter and dominate new geographic regions or markets, incorporating cutting-edge technologies into our business operations, scaling our business while prioritizing quality and customer satisfaction. We are implementing talent acquisition and development strategies to support our growth objectives, differentiating our brand and maintaining a competitive edge in the market over the forming strategic partnerships and collaborations to drive growth and innovation, adapting to changes in consumer preferences, industry trends, and regulatory landscapes. We are implementing sustainability and corporate social responsibility initiatives to strengthen our business, investing in infrastructure, technology, and operations to support our growth objectives, leveraging data and analytics to optimize decision-making and performance, introducing customer experience enhancements to increase loyalty and retention, evolving our business's overall impact and legacy in the next five years.

QUESTION:	YOUR ANSWERS
1. Where do you see your business in terms of revenue and profitability five years from now?	
2. What market share do you envision your business capturing within the next five years?	
3. How do you plan to expand your product or service offerings over the next five years?	
4. What geographic regions or markets do you aim to enter or dominate within the next five years?	
5. What technological advancements or innovations do you anticipate incorporating into your business operations over the next five years?	
6. How do you plan to scale your business while maintaining quality and customer satisfaction over the next five years?	
7. What talent acquisition and development strategies do you have in place to support your growth objectives over the next five years?	
8. How do you plan to differentiate your brand and maintain a competitive edge in the market over the next five years?	
9. What partnerships or collaborations do you envision forming to drive growth and innovation over the next five years?	
10. How do you plan to adapt to changes in consumer preferences, industry trends, and regulatory landscapes over the next five years?	
11. What sustainability and corporate social responsibility initiatives do you plan to implement or strengthen over the next five years?	
12. What investments in infrastructure, technology, and operations do you plan to make to support your growth objectives over the next five years?	
13. How do you plan to leverage data and analytics to optimize decision-making and performance over the next five years?	
14. What customer experience enhancements do you plan to introduce to increase loyalty and retention over the next five years?	
15. How do you envision your business's overall impact and legacy evolving over the next five years?	

Advanced Time Blocking Schedule

How do I complete the Advanced Time Blocking Schedule?

Step 1: Write in each blank space the activities you'd like to fill your ideal week. Be sure to leave time for planning, faith, family, friends, fun, etc.

Step 2: Print the schedule out and review it often to see how close your staying to your ideal week.

HINT: The key experience to this exercise is to conceptualize what your ideal week should look like and then arrange your schedule to pursue it. You won't attain perfection each week but the results from pursuing an ideal week will be quite evident in the amount you accomplish.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
5:00am							
5:30am							
6:00am							
6:30am							
7:00am							
7:30am							
8:00am							
8:30am							
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8:00pm							
8:30pm							

Business Goals

IDENTIFYING AND MONITORING YOUR BUSINESS GOALS

Begin by filling out this worksheet in order to identify your career and financial goals for the upcoming year.

Your Information	
Name	John Doe
Company	ABC Financial
Yearly Goals Beginning:	January 1, 2022

Business Goals Questionnaire		Entries
What is the average revenue you receive per client per transaction?		**$4,500**
How many weeks of vacation would you like to take?		**5**
How many days each week do you want to work?		**5**
How many hours each day do you want to work?		**6**
What % of your leads/contacts do you convert to a presentation appointment?	(Select percentage)	**20%**
What % of your presentation appointments become paying clients?	(Select percentage)	**95%**
What is your desired annual income?		**$250,000**

To See A Breakdown Analysis of Your Goals Click On The "Goal Analysis" Tab Below

GOALS RESULTS SHEET

Name:	John Doe
Company:	ABC Financial
Yearly Goals Beginning:	1/1/2022

Information	**Results**
Average Revenue Per Client Per Transaction:	**$4,500**
Weeks for Vacation:	**5**
Weeks of Business for Year:	**47**
Business Days per Week:	**5**
Business Hours per Day:	**6**
Total Annual Hours:	**1,410**
Annual Gross Income Desired:	**$250,000**
Hourly Rate:	**$177**
Paying Clients Needed to Achieve Your Goals	
Needed per Year	**56**
Needed per Month	**4.6**
Needed per Working Weeks	**1.2**
Needed per Working Day	**0.24**
Leads/Contacts Needed To Achieve Your Goals	
Needed per Year	**292**
Needed per Month	**24.4**
Needed per Working Week	**6.2**
Needed per Working Day	**1.2**
Client Presentations Needed To Achieve Your Goals	
Needed per Year	**58**
Needed per Month	**4.9**
Needed per Working Week	**1.2**
Needed per Working Day	**0.2**

To Track Your Goals Click On The "Goal Tracking" Tab Below

GOALS TRACKING WORKSHEET

Name:	**John Doe**
Company Name:	***ABC Financial***
Yearly Goals Beginning:	**1/1/2022**
# of New Paying Clients Needed Per Month:	**4.63**
Average Monthly Income Goal:	**$20,833**
Annual Income Goal:	**$250,000**

To achieve my career and financial goals, I have committed to the following:

Work	5	Day(s) per week
Work	6	Hour(s) per day
Take	5	Week(s) Vacation Per Year
Average annual revenue:	$4,500	Per Client

Weekly Goal Tracking Form

Week 1	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actual
Leads/Contacts								6.2	0
Presentation Appointments								1.2	0
New Paying Clients								1.2	0

Week 2	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actual
Leads/Contacts								6.2	0
Presentation Appointments								1.2	0
New Paying Clients								1.2	0

Week 3	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actual
Leads/Contacts								6.2	0
Presentation Appointments								1.2	0
New Paying Clients								1.2	0

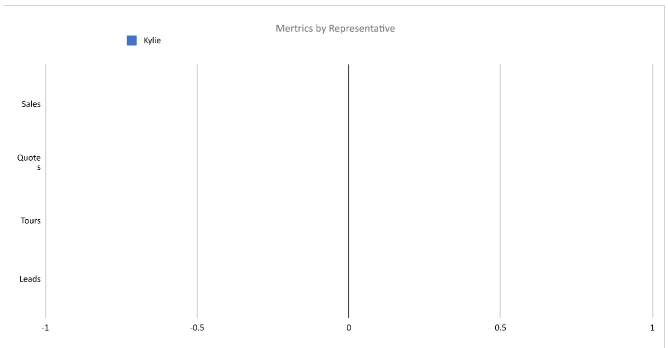
Week 4	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actual
Leads/Contacts								6.2	0
Presentation Appointments								1.2	0
New Paying Clients								1.2	0

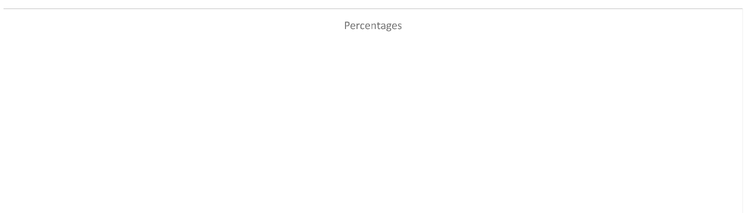
Week 5	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actual
Leads/Contacts								6.2	0
Presentation Appointments								1.2	0
New Paying Clients								1.2	0

MONTHLY SALES TOTAL	**4.63**	**0**

P & L Breakdown	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	P & L Breakdown
Average Sale Amount	$300,000	$300,000	$300,000	$300,000	$300,000	$300,000	$300,000	$300,000	$300,000	$300,000	$300,000	$300,000	$300,000	Average Sale Amount
Number of sales per month	10	10	10	10	10	10	10	10	10	10	10	10	**120**	Number of sales per month
Sales volume	$3,000,000	$3,000,000	$3,000,000	$3,000,000	$3,000,000	$3,000,000	$3,000,000	$3,000,000	$3,000,000	$3,000,000	$3,000,000	$3,000,000	**$ 36,000,000**	Sales volume
Average revenue per sale	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	**$ 4,000**	Average revenue per sale
Gross Sales Revenue	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	$ 40,000	**$ 480,000**	Gross Sales Revenue
Overhead (from below)	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 11,550	$ 138,600	Overhead (from below)
Average Sales Commission %	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	**70%**	Average Sales Commission %
Average Sales Commission Total	$ 28,000	$ 28,000	$ 28,000	$ 28,000	$ 28,000	$ 28,000	$ 28,000	$ 28,000	$ 28,000	$ 28,000	$ 28,000	$ 28,000	**$ 336,000**	Average Sales Commission Total
Gross profit	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 450**	**$ 5,400**	**Gross profit**
Profit percentage	**1%**	**1%**	**1%**	**1%**	**1%**	**1%**	**1%**	**1%**	**1%**	**1%**	**1%**	**1%**	1%	**Profit percentage**
Office Expenses														**Office Expenses**
Staff (benefits included)	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	$ 4,000	**$ 48,000**	Staff (benefits included)
Assistant / Receptionist (benefits included)	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	$ 2,000	**$ 24,000**	Assistant (benefits included)/Receptionist
Misc. Expenses	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	**$ 6,000**	Misc. Expenses
Rent	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	$ 1,500	**$ 18,000**	Rent
Utilities	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	**$ 3,000**	Utilities
Phone	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	$ 600	**$ 7,200**	Phone
Advertising, Marketing	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	$ 1,000	**$ 12,000**	Advertising, Marketing
Legal	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	$ 100	**$ 1,200**	Legal
Conferences	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	**$ 2,400**	Conferences
Leases, equipment, software, etc.	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	$ 250	**$ 3,000**	Leases, equipment, software, etc.
Office supplies	$ 150	$ 150	$ 150	$ 150	$ 150	$ 150	$ 150	$ 150	$ 150	$ 150	$ 150	$ 150	**$ 1,800**	Office supplies
Misc. (postage, subscriptions)	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	$ 200	**$ 2,400**	Misc. (postage, subscriptions)
Tech Support	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	$ 500	**$ 6,000**	Tech Support
Training, Recruiting, etc.	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	$ 300	**$ 3,600**	Training, Recruiting, etc.
Grand Total of Expenses	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 11,550**	**$ 138,600**	**Grand Total of Expenses**

	Leads	Tours	Quotes	Sales	Dollars	Leads to Conversations	Tours to Sales	Leads to Sales
Salesperson #1					$ -	0%	0%	0%
Salesperson #2					$ -	0%	0%	0%
Salesperson #3					$ -	0%	0%	0%
Salesperson #4					$ -	0%	0%	0%
Salesperson #5					$ -	0%	0%	0%
Salesperson #6					$ -	0%	0%	0%
	0	**0**	**0**	**0**	**$ -**			





2024

TOTAL	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Conversations to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Leads to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Dollars	$ -	$ -	$ -	$ -	$ - .00	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Sales Average	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0	0

Salesperson #1	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Conversations to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Leads to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Dollars	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Sales Average	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0	0

Salesperson #2	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	**0%**	**0%**	**0**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Conversations to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Leads to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Dollars	$ -	$ -	$ -	$ -	$ - .00	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Sales Average	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0	0

Salesperson #3	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Conversations to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Leads to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Dollars	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Sales Average	$ -	0	0	0	0	0	0	0	0	0	0	0	0

Salesperson #4	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Conversations to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Leads to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Dollars		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Sales Average	#DIV/0!	0	0	0	0	0	0	0	0	0	0	0	0

Salesperson #5	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Conversations to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Leads to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Dollars	$ -	$ -	$ -	$ -	$ - .00	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Sales Average	$ -	0	0	0	0	0	0	0	0	0	0	0	0

Salesperson #6	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Conversations to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Leads to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Dollars	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Sales Average	0	0	0	0	0	0	0	0	0	0	0	0	0

Salesperson #7	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Conversations to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Leads to Sales %	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**
Dollars	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Sales Average	0	0	0	0	0	0	0	0	0	0	0	0	0

SALESPERSON #1

Week Ending	Leads	Tours	Quotes	Sales	Dollars
1/5/2024					
1/12/2024					
1/19/2024					
1/26/2024					
2/2/2024					
2/9/2024					
2/16/2024					
2/23/2024					
3/1/2024					
3/8/2024					
3/15/2024					
3/22/2024					
3/29/2024					
4/5/2024					
4/12/2024					
4/19/2024					
4/26/2024					
5/3/2024					
5/10/2024					
5/17/2024					
5/24/2024					
5/31/2024					
6/7/2024					
6/14/2024					
6/21/2024					
6/28/2024					
7/5/2024					
7/12/2024					
7/19/2024					
7/26/2024					
8/2/2024					
8/9/2024					
8/16/2024					
8/23/2024					
8/30/2024					
9/6/2024					
9/13/2024					
9/20/2024					
9/27/2024					
10/3/2024					
10/11/2024					
10/18/2024					
10/25/2024					
11/1/2024					
11/8/2024					
11/15/2024					
11/22/2024					
11/29/2024					
12/6/2024					
12/13/2024					
12/20/2024					
12/27/2024					
1/3/2025					

SALESPERSON #2

Week Ending	Leads	Tours	Quotes	Sales	Dollars
1/5/2024					
1/12/2024					
1/19/2024					
1/26/2024					
2/2/2024					
2/9/2024					
2/16/2024					
2/23/2024					
3/1/2024					
3/8/2024					
3/15/2024					
3/22/2024					
3/29/2024					
4/5/2024					
4/12/2024					
4/19/2024					
4/26/2024					
5/3/2024					
5/10/2024					
5/17/2024					
5/24/2024					
5/31/2024					
6/7/2024					
6/14/2024					
6/21/2024					
6/28/2024					
7/5/2024					
7/12/2024					
7/19/2024					
7/26/2024					
8/2/2024					
8/9/2024					
8/16/2024					
8/23/2024					
8/30/2024					
9/6/2024					
9/13/2024					
9/20/2024					
9/27/2024					
10/3/2024					
10/11/2024					
10/18/2024					
10/25/2024					
11/1/2024					
11/8/2024					
11/15/2024					
11/22/2024					
11/29/2024					
12/6/2024					
12/13/2024					
12/20/2024					
12/27/2024					
1/3/2025					

SALESPERSON #3

Week Ending	Leads	Tours	Quotes	Sales	Dollars
1/5/2024					
1/12/2024					
1/19/2024					
1/26/2024					
2/2/2024					
2/9/2024					
2/16/2024					
2/23/2024					
3/1/2024					
3/8/2024					
3/15/2024					
3/22/2024					
3/29/2024					
4/5/2024					
4/12/2024					
4/19/2024					
4/26/2024					
5/3/2024					
5/10/2024					
5/17/2024					
5/24/2024					
5/31/2024					
6/7/2024					
6/14/2024					
6/21/2024					
6/28/2024					
7/5/2024					
7/12/2024					
7/19/2024					
7/26/2024					
8/2/2024					
8/9/2024					
8/16/2024					
8/23/2024					
8/30/2024					
9/6/2024					
9/13/2024					
9/20/2024					
9/27/2024					
10/3/2024					
10/11/2024					
10/18/2024					
10/25/2024					
11/1/2024					
11/8/2024					
11/15/2024					
11/22/2024					
11/29/2024					
12/6/2024					
12/13/2024					
12/20/2024					
12/27/2024					
1/3/2025					

SALESPERSPN #4

Week Ending	Leads	Tours	Quotes	Sales	Dollars
1/5/2024					
1/12/2024					
1/19/2024					
1/26/2024					
2/2/2024					
2/9/2024					
2/16/2024					
2/23/2024					
3/1/2024					
3/8/2024					
3/15/2024					
3/22/2024					
3/29/2024					
4/5/2024					
4/12/2024					
4/19/2024					
4/26/2024					
5/3/2024					
5/10/2024					
5/17/2024					
5/24/2024					
5/31/2024					
6/7/2024					
6/14/2024					
6/21/2024					
6/28/2024					
7/5/2024					
7/12/2024					
7/19/2024					
7/26/2024					
8/2/2024					
8/9/2024					
8/16/2024					
8/23/2024					
8/30/2024					
9/6/2024					
9/13/2024					
9/20/2024					
9/27/2024					
10/3/2024					
10/11/2024					
10/18/2024					
10/25/2024					
11/1/2024					
11/8/2024					
11/15/2024					
11/22/2024					
11/29/2024					
12/6/2024					
12/13/2024					
12/20/2024					
12/27/2024					
1/3/2025					

SALESPERSON #5

Week Ending	Leads	Tours	Quotes	Sales	Dollars
1/5/2024					
1/12/2024					
1/19/2024					
1/26/2024					
2/2/2024					
2/9/2024					
2/16/2024					
2/23/2024					
3/1/2024					
3/8/2024					
3/15/2024					
3/22/2024					
3/29/2024					
4/5/2024					
4/12/2024					
4/19/2024					
4/26/2024					
5/3/2024					
5/10/2024					
5/17/2024					
5/24/2024					
5/31/2024					
6/7/2024					
6/14/2024					
6/21/2024					
6/28/2024					
7/5/2024					
7/12/2024					
7/19/2024					
7/26/2024					
8/2/2024					
8/9/2024					
8/16/2024					
8/23/2024					
8/30/2024					
9/6/2024					
9/13/2024					
9/20/2024					
9/27/2024					
10/3/2024					
10/11/2024					
10/18/2024					
10/25/2024					
11/1/2024					
11/8/2024					
11/15/2024					
11/22/2024					
11/29/2024					
12/6/2024					
12/13/2024					
12/20/2024					
12/27/2024					
1/3/2025					

SALESPERSON #6

Leads	Tours	Quotes	Sales	Dollars
1/5/2024				
1/12/2024				
1/19/2024				
1/26/2024				
2/2/2024				
2/9/2024				
2/16/2024				
2/23/2024				
3/1/2024				
3/8/2024				
3/15/2024				
3/22/2024				
3/29/2024				
4/5/2024				
4/12/2024				
4/19/2024				
4/26/2024				
5/3/2024				
5/10/2024				
5/17/2024				
5/24/2024				
5/31/2024				
6/7/2024				
6/14/2024				
6/21/2024				
6/28/2024				
7/5/2024				
7/12/2024				
7/19/2024				
7/26/2024				
8/2/2024				
8/9/2024				
8/16/2024				
8/23/2024				
8/30/2024				
9/6/2024				
9/13/2024				
9/20/2024				
9/27/2024				
10/3/2024				
10/11/2024				
10/18/2024				
10/25/2024				
11/1/2024				
11/8/2024				
11/15/2024				
11/22/2024				
11/29/2024				
12/6/2024				
12/13/2024				
12/20/2024				
12/27/2024				
1/3/2025				

SALESPERSON #7

Leads	Tours	Quotes	Sales	Dollars
1/5/2024				
1/12/2024				
1/19/2024				
1/26/2024				
2/2/2024				
2/9/2024				
2/16/2024				
2/23/2024				
3/1/2024				
3/8/2024				
3/15/2024				
3/22/2024				
3/29/2024				
4/5/2024				
4/12/2024				
4/19/2024				
4/26/2024				
5/3/2024				
5/10/2024				
5/17/2024				
5/24/2024				
5/31/2024				
6/7/2024				
6/14/2024				
6/21/2024				
6/28/2024				
7/5/2024				
7/12/2024				
7/19/2024				
7/26/2024				
8/2/2024				
8/9/2024				
8/16/2024				
8/23/2024				
8/30/2024				
9/6/2024				
9/13/2024				
9/20/2024				
9/27/2024				
10/3/2024				
10/11/2024				
10/18/2024				
10/25/2024				
11/1/2024				
11/8/2024				
11/15/2024				
11/22/2024				
11/29/2024				
12/6/2024				
12/13/2024				
12/20/2024				
12/27/2024				
1/3/2025				

2024 MONTHLY

Leads	Tours	Quotes	Sales	Dollars	
1/5/2024	0	0	0	$ -	
1/12/2024	0	0	0	$ -	
1/19/2024	0	0	0	$ -	
1/26/2024	0	0	0	$ -	
2/2/2024	0	0	0	$ -	
2/9/2024	0	0	0	$ -	
2/16/2024	0	0	0	$	
2/23/2024	0	0	0	$ -	
3/1/2024	0	0	0	$ -	
3/8/2024	0	0	0	$	
3/15/2024	0	0	0	$ -	
3/22/2024	0	0	0	$ -	
3/29/2024	0	0	0	$ -	
4/5/2024	0	0	0	$ -	
4/12/2024	0	0	0	$ -	
4/19/2024	0	0	0	$ -	
4/26/2024	0	0	0	$ -	
5/3/2024	0	0	0	$ -	
5/10/2024	0	0	0	$ -	$ -
5/17/2024	0	0	0	$ -	
5/24/2024	0	0	0	$ -	
5/31/2024	0	0	0	$ -	
6/7/2024	0	0	0	$ -	
6/14/2024	0	0	0	$ -	
6/21/2024	0	0	0	$ -	
6/28/2024	0	0	0	$ -	
7/5/2024	0	0	0	$	
7/12/2024	0	0	0	$ -	
7/19/2024	0	0	0	$ -	
7/26/2024	0	0	0	$	
8/2/2024	0	0	0	$ -	
8/9/2024	0	0	0	$ -	
8/16/2024	0	0	0	$ -	
8/23/2024	0	0	0	$ -	
8/30/2024	0	0	0	$ -	
9/6/2024	0	0	0	$ -	
9/13/2024	0	0	0	$ -	
9/20/2024	0	0	0	$ -	
9/27/2024	0	0	0	$ -	
10/3/2024	0	0	0	$ -	
10/11/2024	0	0	0	$ -	
10/18/2024	0	0	0	$ -	
10/25/2024	0	0	0	$ -	
11/1/2024	0	0	0	$ -	
11/8/2024	0	0	0	$ -	
11/15/2024	0	0	0	$ -	
11/22/2024	0	0	0	$	
11/29/2024	0	0	0	$ -	
12/6/2024	0	0	0	$ -	
12/13/2024	0	0	0	$	
12/20/2024	0	0	0	$ -	
12/27/2024	0	0	0	$ -	
1/3/2025	0	0	0	$ -	
2410333	0	0	0	$ -	

Life and Business Planning		
Done?	**Items to do**	**Due By**
	1. Schedule a day in your time management system to Create or Refine Your Life and Business Plan	
	2. Complete the Life Plan tab and clarify your personal goals and dreams.	
	3. Create an Action Plan and Due Dates for each of the goals and action steps you establish inside both your life and business plan	
	4. Complete Your Business Plan and Financial Scorecard to focus on what matters most	
	5. Create a 12 Month Pro-Forma: Project your monthly/yearly expenses and estimated revenues using the "Pro-Forma" worksheet inside this workbook to gain a clear understanding of what it will take to hit your profitability goals.	
	6. Re-take this assessment in 90 days and see if you've improved in the Life & Business Plan category	
	7. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	

Ideal Client Profile

QUESTION:	YOUR ANSWERS
1. What demographics best describe your ideal client (age, gender, income level, education, etc.)?	
2. What are the primary pain points or challenges your ideal clients face that your business can solve?	
3. Where do your ideal clients spend their time online (social media platforms, forums, blogs, etc.)?	
4. What are the key interests, hobbies, or lifestyle characteristics of your ideal clients?	
5. What are the common values or beliefs shared by your ideal clients?	
6. What motivates your ideal clients to make purchasing decisions (price, quality, convenience, status, etc.)?	
7. Who are your current satisfied clients, and what commonalities do they share?	
8. What are the geographic locations or regions where your ideal clients are concentrated?	
9. What industry or niche are your ideal clients primarily involved in?	
10. What are the communication preferences of your ideal clients (email, phone calls, social media messaging, etc.)?	
11. What are the buying behaviors or patterns of your ideal clients (frequency of purchase, preferred payment methods, etc.)?	
12. What are the primary goals or aspirations of your ideal clients, and how does your business align with them?	
13. What are the objections or hesitations your ideal clients might have about purchasing your product or service, and how can you address them?	
14. What feedback or testimonials do you have from past clients that can provide insights into your ideal client profile?	
15. How do your ideal clients perceive your competitors, and what factors differentiate your business in their eyes?	

S.W.O.T. ANALYSIS & U.V.P.

Identify Your Corporate Strengths, Weaknesses, Opportunities and Threats

STRENGTHS	WEAKNESSES

OPPORTUNITIES	THREATS

What is your Unique Value Proposition?

To develop a strong UVP, start by identifying the unique features and benefits of your product or service. Next, consider the needs and wants of your target market and how your product or service meets those needs. Finally, craft a clear and concise statement that communicates the value that your product or service provides.

YOUR UNIQUE VALUE PROPOSITION

MY MARKETING PLAN

In this section identify you marketing targets, how you will reach them, how often and how much your marketing will cost.

TARGET #1			
Phase	**Activities**	**Frequency**	**Cost**
Lead Generation	Lunch Meeting	Daily	
Lead Generation			
Lead Generation			
Lead Generation			
Lead Generation			
Lead Generation			
Client Retention			
Client Retention			
Client Retention			
		Total	$0

TARGET #2			
Phase	**Activities**	**Frequency**	**Cost**
Lead Generation			
Lead Generation			
Lead Generation			
In Process			
In Process			
In Process			
Client Retention			
Client Retention			
Client Retention			
		Total	$0

TARGET #3			
Phase	**Activities**	**Frequency**	**Cost**
Lead Generation			
Lead Generation			
Lead Generation			
In Process			
In Process			
In Process			
Client Retention			
Client Retention			
Client Retention			
		Total	$0

TARGET #4			
Phase	**Activities**	**Frequency**	**Cost**
Lead Generation			
Lead Generation			
Lead Generation			
In Process			
In Process			
In Process			
Client Retention			
Client Retention			
Client Retention			
		Total	$0

TARGET #5			
Phase	**Activities**	**Frequency**	**Cost**
Lead Generation			
Lead Generation			
Lead Generation			
In Process			
In Process			
In Process			
Client Retention			
Client Retention			
Client Retention			
		Total	$0

TARGET #6			
Phase	**Activities**	**Frequency**	**Cost**
Lead Generation			
Lead Generation			
Lead Generation			
In Process			
In Process			
In Process			
Client Retention			
Client Retention			
Client Retention			
		Total	$0

TARGET #7			
Phase	**Activities**	**Frequency**	**Cost**
Lead Generation			
Lead Generation			
Lead Generation			
In Process			
In Process			
In Process			
Client Retention			
Client Retention			
Client Retention			
		Total	$0

TARGET #8 - OTHER			
Phase	**Activities**	**Frequency**	**Cost**
Lead Generation			
Lead Generation			
Lead Generation			
In Process			
In Process			
In Process			
Client Retention			
Client Retention			
Client Retention			
		Total	$0

Total Marketing Budget = $0

Marketing Phase
Lead Generation
In Process
Client Retention

Your Frequency
Daily
Weekly
Bi-Monthly
Monthly
Every Other Month
Quarterly
Semi-Annually
Annually

Your Activities
Direct Mail
Post Card
Newsletter
Email
Newspaper Ad
Seminar
Tele-Marketing
Call Capture
Blog
Podcast
Internet Leads
Radio/TV Ads
Internet Ads
Special Event
Lunch Meeting
Associations
Chamber

MARKETING CALENDAR

Identify and schedule the release of your marketing materials.

JANUARY			
Action	**Notes**	**Due**	**Done**
Newsletter		1st	
Post Card		6th	
Direct Mail		9th	
Seminar		12th	
Tele-Marketing		15th	
Internet Leads		18th	
Radio/TV Ads		21st	
Special Event		24th	
Blog		27th	

FEBRUARY			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

MARCH			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

APRIL			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

MAY			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

JUNE			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

JULY			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

AUGUST			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

SEPTEMBER			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

OCTOBER			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

NOVEMBER			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

DECEMBER			
Action	**Notes**	**Due**	**Done**
		1st	
		6th	
		9th	
		12th	
		15th	
		18th	
		21st	
		24th	
		27th	

LIST OF "ACTIONS"
Direct Mail
Post Card
Newsletter
Email
Newspaper Ad
Seminar
Tele-Marketing
Call Capture
Blog
Podcast
Internet Leads
Radio/TV Ads
Internet Ads
Special Event
(insert activity)
(insert activity)
(insert activity)
(insert activity)

Due Dates
1st
2nd
3rd
4th
5th
6th
7th
8th
9th
10th
11th
12th
13th
14th
15th
16th
17th
18th
19th
20th
21st
22nd
23rd
24th
25th
26th
27th
28th
29th
30th
31st

SOURCE TRACKING - WHERE IS YOUR BUSINESS COMING FROM?

Month:	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec		
Source:													**Totals**	**%**
Past Clients	1												1	50%
Friends	1												1	50%
Relatives													0	0%
Website													0	0%
Email Marketing													0	0%
Seminars													0	0%
Direct Mail													0	0%
Chamber													0	0%
Articles													0	0%
Corporate Marketing													0	0%
Associations													0	0%
Other:													0	0%
Other:													0	0%
Other:													0	0%
Other:													0	0%
Other:													0	0%
Other:													0	0%
Other:													0	0%
Totals	2	0	0	0	0	0	0	0	0	0	0	0	2	

Marketing Strategies		
Done?	**Items to do**	**Due By**
	1. Schedule time into your time management system to improve your marketing skills and strategies and to spend time each week in marketing specific activities.	
	2. Create Your Marketing Plan: If you haven't developed your "Marketing Plan" please go back to the previous tabs to create your plan and then develop your "Marketing Calendar".	
	3. Update Your Marketing Plan with Lead Generation, In-Process and Client Retention Strategies: To build a steady flow of incoming leads you should market your business during each of these phases to maximize your lead generation opportunities.	
	3a. Lead Generation: These strategies include all marketing tactics you will use to generate new relationships with prospects you currently do not have a personal relationship with (i.e. newspaper ads, articles you write, blogging, podcasting, direct mail, etc).	
	3b. In-Process Marketing: These strategies include all marketing and referral strategies you deploy while coaching a clients (i.e. thank you letters, referral requests, added value gifts, etc).	
	3c. Client Retention: These strategies included all marketing and referral strategies you deploy after you have concluded a coaching relationship with a client to improve the possibilities of coaching that client in the future and/or receiving referrals from them.	
	4. Review and Measure Results: Establish a tracking system inside your standard process to ensure you capture the source (referral and/or marketing) on every lead that comes in and measure what strategies are pulling the best response and closing ratios. Use the previous tab labeled "Source Tracking" to tally the results at the end of each week or month and then reviewing the results on a consistent basis. Once results have been established spend more time and money on the ones that are working or try a new strategy from the community to better connect with your marketplace	
	5. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	

Top Referral List

List Your Top Referral Sources In Order of Priority (A, B and C)

Date:

P	Business Owners	P	Friends	P	Relatives	P	Chamber Members	P	HR Managers	P	Top Clients
			Hot Prospects		**Hot Prospects**		**Hot Prospects**		**Hot Prospects**		
		P	**Accountants**	**P**	**Financial Planners**	**P**	**Attorneys**	**P**	**Insurance Agt's**		
	Hot Prospects		**Hot Prospects**		**Hot Prospects**		**Hot Prospects**		**Hot Prospects**		**Hot Prospects**

Referral Partnerships		
Done?	**Items to do**	**Due By**
	1. Schedule time into your time management system to improve your Referral Partnerships	
	2. Build Your Top Referral List: Go to the previous tab named "Top Referral Source" and add the names of your top referral sources or prospects under each of the referral categories listed to get laser focused on who your top referral sources and prospects are in each area	
	3. The Approach: Develop a :30 second "Elevator Speech" to help you approach more clients and referral sources to establish credibility. Create and refine your competitive advantages and your unique selling proposition.	
	4. Presenting: Review and revise your current referral source presentation. Does it include personal testimonials, a review of the referral sources goals/objectives, easy to understand visual aid/graphs/charts and beneficial solutions that would compel them to do business with you?	
	5. Overcoming Objections: Do you know what your most common objections are from clients and prospective referral partners? List out the top 5-10 objections and script out a response that will help you overcome these objections and then memorize the scripts.	
	6. Closing Techniques: Do you know how to close the sale? Script out your closing techniques to assist you in helping customer to make the decision to purchase and then memorize the scripts.	
	7. Following up: Schedule specific times during the day, week and/or month to focus on following up with your top referral sources	
	8. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	

Team Member Coaching

My Performance Review Dates Are The Following: 1/15, 4/15, 7/15, 9/15

Rank	Name	Grade	What you can do to improve their performance…
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			

Recruiting Targets

Who are your top candidates you'd like to join your team?

Rank	Name	Grade	What's your next step to attract them to join your team?
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			

MY TRAINING PLAN

In this section identify your training plan, how often and how much your training will cost.

POSITION GROUP #1

Phase	Activities	Frequency	Cost
Orientation	Orientation Training	Single Event	
Orientation	Online Training	Single Event	
Ongoing	Weekly Meetings	Weekly	
Ongoing	Mentoring	Weekly	
Ongoing			
Ongoing			
Advanced			
Advanced			
Advanced			
		Total	$0

POSITION GROUP #2

Phase	Activities	Frequency	Cost
Orientation	Boot Camp	Single Event	
Orientation	Conference Calls	Single Event	
Ongoing	Company Website	Weekly	
Ongoing	One on One	Weekly	
Ongoing			
Ongoing			
Advanced			
Advanced			
Advanced			
		Total	$0

POSITION GROUP #3

Phase	Activities	Frequency	Cost
Orientation	Orientation Training	Single Event	
Orientation	Online Training	Single Event	
Ongoing	Weekly Meetings	Weekly	
Ongoing	Mentoring	Weekly	
Ongoing			
Ongoing			
Advanced			
Advanced			
Advanced			
		Total	$0

POSITION GROUP #4

Phase	Activities	Frequency	Cost
Orientation	Orientation Training	Single Event	
Orientation	Online Training	Single Event	
Ongoing	Weekly Meetings	Weekly	
Ongoing	Mentoring	Weekly	
Ongoing			
Ongoing			
Advanced			
Advanced			
Advanced			
		Total	$0

Total Training Budget = $0

Marketing Phase
Orientation
Ongoing
Advanced

Your Frequency
Single Event
Daily
Weekly
Bi-Monthly
Monthly
Every Other Month
Quarterly
Semi-Annually
Annually

Your Activities
Boot Camp
Conference Calls
Company Website
Mentoring
One on One
Online Training
Orientation Training
Podcasts
Sales Conference
Self Study
Shadowing
1-Day Seminar
2-Day Seminar
3-Day Seminar
Special Event
Webinar
Weekly Meetings

TRAINING CALENDAR

Identify and schedule your training programs for the upcoming year.

JANUARY

Topic	Notes	Date	Done

FEBRUARY

Topic	Notes	Date	Done

MARCH

Topic	Notes	Date	Done

APRIL

Topic	Notes	Date	Done

MAY

Topic	Notes	Date	Done

JUNE

Topic	Notes	Date	Done

JULY

Topic	Notes	Date	Done

AUGUST

Topic	Notes	Date	Done

SEPTEMBER

Topic	Notes	Date	Done

OCTOBER

Topic	Notes	Date	Done

NOVEMBER

Topic	Notes	Date	Done

DECEMBER

Topic	Notes	Date	Done

Sales Plan		
Done?	**Items to do**	**Due By**
	1. Schedule time into your time management system to improve your sales skills to improve your prospect to closing conversion ratios and begin increasing your income today!	
	2. Prospecting: Develop a standard profile of your ideal client/customer to help you clearly focus on who you should be prospecting.	
	3. The Approach: Develop a :30 second "Elevator Speech" to help you approach more clients and referral sources to establish credibility. Create and refine your competitive advantages and your unique selling proposition.	
	4. Presenting: Review and revise your current referral source presentation. Does it include personal testimonials, a review of the referral sources goals/objectives, easy to understand visual aid/graphs/charts and beneficial solutions that would compel them to do business with you?	
	5. Overcoming Objections: Do you know what your most common objections are from clients and prospective referral partners? List out the top 5-10 objections and script out a response that will help you overcome these objections and then memorize the scripts.	
	6. Closing Techniques: Do you know how to close the sale? Script out your closing techniques to assist you in helping customer to make the decision to purchase and then memorize the scripts.	
	7. Following up: Schedule specific times during the day, week and/or month to focus on following up with your top referral sources	
	8. Following up: Schedule specific times during the day, week and/or month to focus on following up with past prospects and associated leads	
	9. Customer Service: Create your own "Customer Service Checklist" on the key contact points where you can create Raving Fans	
	10. Time Management: Complete the "Time Blocking Schedule" form on the next Tab (Time Blocking) and complete your "Perfect Week" by adding in your highest payoff and highest priorities to gain the focus you need to succeed	
	11. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	

Shareholders/Family

Board

CEO

VP of Sales

Sales Manager

Sales Staff

Marketng Mgr

Marketing Staff

V.P. of Ops

Ops Staff

V.P. of Admin

Admin Staff

Leadership Plan		
Done?	**Items to do**	**Due By**
	1. Schedule time into your time management system to improve your leadership skills today!	
	2. Habits – Clarify the leadership habits you want to see throughout your organization	
	3. Priority Management – Create time blocks for your highest leadership priorities and organize your calendar to match your goals and what matters most to you.	
	4. Peak Performance Culture – Define your cultural standards and the environment you wish to create.	
	5. Organizational Chart – Create an organization chart with clear communication path and defined job descriptions.	
	6. Common Leadership Issues – Identify the most common leadership issues, challenges and barriers you're experiencing and next steps for each of them using "What happened?, What did we want to happen? What's missing? and What's next?" as a framework.	
	7. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	

Operations Plan		
Done?	**Items to do**	**Due By**
	1. Schedule time into your time management system to improve your operational systems and increase your efficiency and effectiveness today!	
	2. Technology: Are you leveraging technology in your business to increase your available time each day to do your highest payoff activities? Begin researching strategies to leverage technology to simplify your business.	
	3. Process Flow: Do you have a complete breakdown of the Process Flow of your standard processes and procedures? Top businesses know who is doing what, when, why and how. Start a process manual today by breaking down standard processes into checklists, forms or scripts to simplify your training of new employees and improve your	
	4. Client Retention Checklist: Do you have a process for what sales and marketing activities need to be done to ensure your client's will remember you in the future after you make the sale? Develop your Client Retention Checklist today!	
	5. Team Members Resources: Do you have a complete job description for your team members/assistant(s)? Their success and your enjoyment in their work comes from knowing what their responsibilities are each and every day. Create standard job descriptions for each team member and watch your employees begin to smile again.	
	6. Workspace Organization: Review the functionality of your current workspace/office and make adjustments as necessary to improve your efficiency and effectiveness such as organizing file drawers, setting up a filing system to better organize paperwork on your desk.	
	7. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	