

The Exclusive Coaching Program

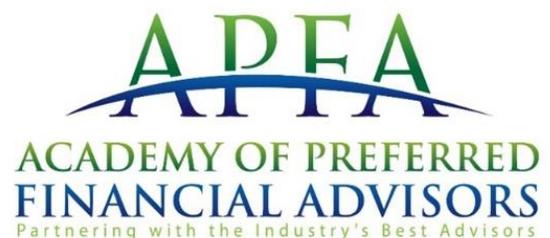
Proven Systems ... Customized Advice ... Results

GROWTH INITIATIVE ESSENTIALS WORKBOOK

Your Fast Pass to Growth

Planning the Essential Components of
Your 2020 Growth Initiative

1. Basic Client Communication
2. Specialty Mailings
3. Holiday/Social Cards
4. Client Events
5. Elite Client Events
6. Client Lunch/Dinner/Private Meetings
7. Client Introduction Program
8. New Client Dinner
9. Monthly Prospecting Mailing Campaign
10. Networking Partners
11. Public/Private/Corporate Seminars
12. Other Marketing



1 Basic Client Communications

Mailing		Month
1	Quarterly Economic Update	January April July October
2	Tax Reports	Feb/March Nov
3	Articles/Reports	Monthly as needed

2 Specialty Mailings

Item	Month
1	Welcome to 2020
2	Bite Back at IRS
3	
4	

3 Holiday/Social Cards

Item	Month/Frequency
1	
2	
3	
4	
5	Birthday/ Anniversary

4 Client Events

Client Education Events

Goal: 2-5 events

Topic	Month
1	2020 Workshop
2	Economic Update/Summit
3	Year-end Workshop
4	
5	

Client Appreciation Events

Goal: 2-4 events

Topic	Month
1	Holiday Movie
2	
3	
4	

5 Elite Client Events

Goal: 2-6 events

Quarter	# Planned	Topics
1 st quarter		
2 nd quarter		
3 rd quarter		
4 th quarter		

6 Client Lunch/Dinner/ Private Meetings

Goal: 5-15

Plan:

Set up a lunch, dinner or private meeting (i.e. golf) with your best clients and their friends.

Quarter	Quarterly Goals
1 st quarter	
2 nd quarter	
3 rd quarter	
4 th quarter	

7 Client Introduction Program

Goal: Establish a program to reward clients who refer qualified prospects.

Plan:

1. Determine criteria for Client Introduction qualification.
2. Send out an announcement to your best A & B clients.
3. Mention Client Introduction Program at client reviews and when appropriate.
4. Hold Client Introduction Event.

Client Introduction Event

Event:

Date:

8 New Client Dinner

Goal: As Needed

Dinner

Date:

9 Monthly Prospecting Mailing Campaign

Goal: 200 +

Current Participants: _____

Your Target: _____

Month	Mailing	# Mailed
Jan		
Feb		
Mar		
April		
May		
June		
July		
Aug		
Sept		
Oct		
Nov		
Dec		

10 Networking Partners

Goal: Establish a “true” referral relationship with 2-3 other professionals.

Plan:

1. Identify your 2-4 most ideal professionals.
2. Personally meet with these professionals.
3. Identify your preferred prospects.
4. Set a goal of at least one lead in the next 3-6 months.

11 Public/Private/Corporate Seminars

	Group/Org	Month
1		
2		
3		

12 Other Marketing