

The Exclusive Coaching Program

Proven Systems ... Customized Advice ... Results

GROWTH INITIATIVE ESSENTIALS WORKBOOK Your Fast Pass to Growth

Planning the Essential Components of
Your 2021 Growth Initiative



1. Foundational Client Mailings

	Mailing	Month
1	Four Quarterly Economic Updates	January April July October
2	Two Tax Reports	Feb or March Nov
3	Articles/Reports	Monthly as needed
4	Welcome to 2021	January or February
5	Bite Back at IRS	March or April
6	Cards (<i>Birthday, Anniversary, Congrats...</i>)	As needed
7		
8		

2. Client Events

Client Educational Events

Goal for 2021: All

	Topic	Month
1	Welcome to 2021	January
2	Proactive Tax Planning	March
3	Spring Investor Update	April
4	Mid-year Economic Update/Summit	July
5	Fall Investor Update	September
6	Year-end Tax Workshop	October
7	Year-end Investor Workshop	November

Client Appreciation Events

Goal for 2021: 1-3 events

	Theme	Month
1	Holiday Movie	December
2		
3		

Due to COVID-19 concerns, most practices are not planning to hold in-person events until the 4th Quarter of 2021. As a substitute, they are recording virtual workshops and sending links to their clients and prospects.

3. Client Introduction Program

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

Plan:

- Determine criteria for Client Introduction qualification.
- Send out an announcement to your best A & B clients.
- Discuss Client Introduction Program at client reviews and when appropriate.
- Offer a small thank you (such as a delivered meal) or hold Client Introduction Event (virtual if necessary).

Client Introduction Event

Event:

Date:

4. New Client Event

(Virtual if necessary)

Goal: As Needed

Date:

6. Monthly Prospecting Mailing Campaign

Goal: 200 + participants

Current Participants: _____

Your target for each quarter: _____

5. Networking Partners

Goal: Establish a beneficial referral relationship with 2-3 other professionals.

Plan:

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

Quarter	Target #	Current #
Q1		
Q2		
Q3		
Q4		

7. Other Marketing

