

PARTNER

COACHING

WORKBOOK



GATEWAY FINANCIAL  
PARTNERS

# PARTNER COACHING WORKBOOK



GATEWAY FINANCIAL  
PARTNERS

# WHAT'S YOUR MOTIVATION?

Name: \_\_\_\_\_ Date: \_\_\_\_\_

What is motivating you to complete this workbook today?

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Do you have a Personal Mission or Vision for your practice?

What is your vision for your practice over the next 1-3 years?

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DO YOU HAVE A WRITTEN BUSINESS PLAN FOR YOUR PRACTICE?

YES

NO

DO YOU HAVE WRITTEN GOALS FOR YOURSELF TO ACCOMPLISH IN YOUR PRACTICE?

YES

NO

DO YOU HAVE A SYSTEM IN PLACE TO MONITOR YOUR WRITTEN GOALS ON A REGULAR BASIS?

YES

NO

HOW CONFIDENT DO YOU FEEL ABOUT YOUR "ELEVATOR PITCH"? 1 2 3 4 5

*(Rank from 1 to 5 where 1 is I don't have one or not very confident and 5 is very confident)*

WHAT ARE 5 CHARACTERISTICS OF YOUR "IDEAL CLIENT"?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_



HAVE YOU CURRENTLY COMPLETED THESE MARKETING MUSTS?

- Biography
- Website
- Introduction Letters
- Grand Opening/ Client Appreciation
- LinkedIn®
- Identify Target Markets
- REDTAIL
- Join Networking Group

WHERE ARE YOUR LEADS COMING FROM?

**Lead Generation**

- Introductions \_\_\_\_\_ %
- Direct Mail \_\_\_\_\_ %
- Email Marketing \_\_\_\_\_ %
- Natural Marketing \_\_\_\_\_ %
- Target Market \_\_\_\_\_ %
- 25 lead Program \_\_\_\_\_ %
- Annual Reviews \_\_\_\_\_ %
- Cold Calls \_\_\_\_\_ %
- Seminar Marketing \_\_\_\_\_ %

RATE YOUR CLIENT ENGAGEMENT SKILLS.  
*(on a scale of 1 - 5; 5 being the best)*

**Client Engagement Capacity**

- Connecting with people \_\_\_\_\_
- Fact Finding / Exploring \_\_\_\_\_
- Solution / Case Design \_\_\_\_\_
- Collaboration / Presenting Suggestions \_\_\_\_\_
- Implementation of Plan \_\_\_\_\_
- Servicing your Clients \_\_\_\_\_

STRATEGIES I CAN EXECUTE ON TO IMPROVE THE FOLLOWING AREAS:

Organizing Priorities

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Client Service Model

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Client Acquisition

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Marketing Approach

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Professional Development

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Working with COI's

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# SWOT ANALYSIS

## So what is SWOT?

The SWOT analysis is a business technique that you can perform on each of your products, services, and markets when deciding on the best way to achieve future growth. The process involves identifying the strengths and weaknesses of your practice, and opportunities and threats present in the market that it operates in. The first letter of each of these four factors creates the acronym SWOT.

The completion of the SWOT analysis should help you to decide which market segments offer you the best opportunities for success and profitable growth over the life cycle of your product or service.

# STRENGTHS WEAKNESSES OPPORTUNITIES THREATS

Internal	Strengths	Weaknesses
1.		1.
2.		2.
3.		3.
4.		4.
5.		5.

External	Opportunities	Threats
1.		1.
2.		2.
3.		3.
4.		4.
5.		5.

SWOT Analysis Summary

# QUARTERLY MUST DO'S

Items that are holding you back from moving forward.

<input type="checkbox"/>	1.
<input type="checkbox"/>	2.
<input type="checkbox"/>	3.
<input type="checkbox"/>	4.
<input type="checkbox"/>	5.
<input type="checkbox"/>	6.
<input type="checkbox"/>	7.
<input type="checkbox"/>	8.
<input type="checkbox"/>	9.
<input type="checkbox"/>	10.

# QUARTERLY GOALS

Items that you want to accomplish this quarter.

Be **SMART** - **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imed  
*(Refer to page 17 for some help setting goals)*

<input type="checkbox"/>	1.
<input type="checkbox"/>	2.
<input type="checkbox"/>	3.
<input type="checkbox"/>	4.
<input type="checkbox"/>	5.



# TOP 20 NOW

List your top 20 relationships that will generate the most revenue **over the next 90 days.**

*(Refer to page 17 for some help setting goals)*

Name	Best Outcome
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.
11.	11.
12.	12.
13.	13.
14.	14.
15.	15.
16.	16.
17.	17.
18.	18.
19.	19.
20.	20.

# TOP 20 LATER

List your top 20 relationships that will generate the most revenue **after the next 90 days.**

Name	Best Outcome
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.
11.	11.
12.	12.
13.	13.
14.	14.
15.	15.
16.	16.
17.	17.
18.	18.
19.	19.
20.	20.

# ONE YEAR GOALS

Items that you want to accomplish this quarter.  
Be **SMART** - **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imed  
*(Refer to page 17 for some help setting goals)*

<input type="checkbox"/>	1.
<input type="checkbox"/>	2.
<input type="checkbox"/>	3.
<input type="checkbox"/>	4.
<input type="checkbox"/>	5.

# THREE YEAR GOALS

Items that you want to accomplish this quarter.  
Be **SMART** - **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imed  
*(Refer to page 17 for some help setting goals)*

<input type="checkbox"/>	1.
<input type="checkbox"/>	2.
<input type="checkbox"/>	3.
<input type="checkbox"/>	4.
<input type="checkbox"/>	5.

# LIFETIME GOALS

Items that you want to accomplish this quarter.  
Be **SMART** - **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imed  
*(Refer to page 17 for some help setting goals)*

<input type="checkbox"/>	1.
<input type="checkbox"/>	2.
<input type="checkbox"/>	3.
<input type="checkbox"/>	4.
<input type="checkbox"/>	5.

# HAVE YOU BUILT YOUR IDEAL TEAM?

Fill in your team below. If you currently don't have a name for a slot, highlight and create a list of possible team members to interview.

P&C Specialist  
\_\_\_\_\_

Small Business Support  
\_\_\_\_\_

Investment Specialist  
\_\_\_\_\_

Advanced Markets Specialist  
\_\_\_\_\_

Life Insurance Specialist  
\_\_\_\_\_

Group Benefits  
\_\_\_\_\_

LTC Specialist  
\_\_\_\_\_

DI Specialist  
\_\_\_\_\_

Annuities Specialist  
\_\_\_\_\_



# COACHING



GATEWAY FINANCIAL  
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# GOAL SETTING REFERENCE

## Purpose

This one-page document provides an overview of the goal setting process.

## Why set goals?

A goal is a well-defined target that:

- ✦ Forces you to set priorities that will help you accomplish those things important to you.
- ✦ Focuses your time, energy, and resources onto those targets you want to accomplish.
- ✦ Motivates you to overcome any obstacles or setbacks and reach your goal.
- ✦ Provides direction to get you from where you are today to where you want to be.

## SMART Goals

Clearly defined or SMART goals should include the following criteria:

<b>S</b>	<b>Specific</b>	Goals should be specific. If your goal can be broken down into smaller steps, it may not be specific enough.
<b>M</b>	<b>Measurable</b>	Goals should contain a standard measurement you can use to track your progress. Measuring your progress helps you stay on track.
<b>A</b>	<b>Attainable</b>	Goals should be attainable, yet make you stretch beyond your comfort zone. Goals that are too easy demotivate you and goals that are too hard set you up for failure.
<b>R</b>	<b>Relevant</b>	Goals should be important and relatable to you both personally and professionally.
<b>T</b>	<b>Time-bound</b>	Goals should have a realistic timeframe to keep you focused on completing the goal. Too much time can cause you to lose motivation. Too little time makes the goal feel impossible to achieve.

## Goal Setting Process

The process of setting goals includes the following steps:

1. **Pick a starting point** - Take stock of where you are in each important area of your life; such as family, work, health, spiritual, relationships, recreation, education, social, financial, and community.
2. **Write down your goals** - List all of your goals on a sheet of paper; writing down whatever comes to mind. If you are stuck, prompt yourself by asking, "What do I want to accomplish?"
3. **Prioritize your list** - Rearrange your goals in order of importance, with the most important goals listed first. This becomes your master list.
4. **Check for balance and conflicts**. Check to see that your goals do not conflict each other and that they balance your personal and professional lives. A good rule of thumb is to choose three business goals and two personal goals to work toward.
5. **Create a realistic action plan** - List the details for each goal on your master list, including why you want to accomplish it; daily, weekly, and monthly actions you need to do to reach the goal; measurements to track your progress; and deadlines for short-term activities and your long-term goal.
6. **Take action!** - After you have detailed your action plan, remember to follow through. A written plan without action is just words.
7. **Create checkpoints** - Review your progress regularly and if necessary, redefine your goals to reflect priority or life changes.

## Remember

Goal setting is not easy; it takes time and effort. To be successful, you should remember:

- ✦ Goals should **S—T—R—E—T—C—H** you beyond your comfort zone.
- ✦ An unwritten goal is just wishful thinking; written goals increase your chance for success.
- ✦ Sharing your goals and achievements with other people increases your commitment.
- ✦ Regularly review your goals and make adjustments as needed.
- ✦ Remember, actions speak louder than words! The proper behavior is the key to reaching your goals.



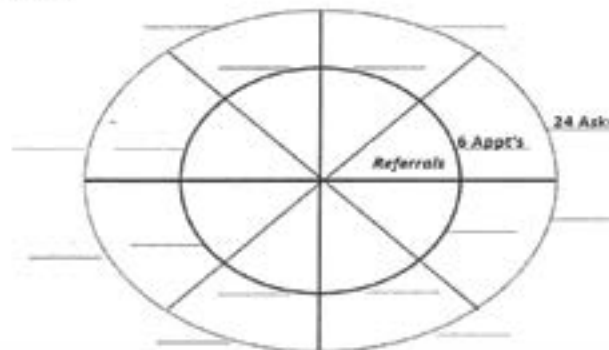
# COOKBOOK REFERENCE SHEET

<b>Purpose</b>	This one-page document provides a high-level overview of the cookbook, which is part of the Behavior element in the Sandler® Success Triangle.
<b>What Is a Cookbook?</b>	<p>The cookbook is used to write recipes for personal and professional success. It outlines the business development activities and behaviors that you should perform on a regular basis to reach your sales goals such as the number of telephone calls you have to make and the number of referrals you have to get.</p> <p>Besides client development, the cookbook also contains recipes for client management, sales and other areas, as necessary.</p>
<b>Why Is It Important?</b>	<p>The cookbook is important because it:</p> <ul style="list-style-type: none"><li>✦ Helps you focus on your end result; your personal and professional goals</li><li>✦ Outlines the activities and behaviors you have to do every day to meet your goals</li><li>✦ Helps you to identify areas for improvement and issues such as why you may not be closing a sale</li><li>✦ Breaks activities down into small, manageable chunks</li><li>✦ Allows you to adjust your activities depending on the situation that may arise</li><li>✦ Can be used as a psychological tool to help you do things you don't like to do (telephoning)</li><li>✦ Makes you accountable for your behavior</li><li>✦ Promotes consistency in your behavior; which is something you can control</li><li>✦ Provides you with the opportunity to control your outcomes</li></ul>
<b>How to Create a Cookbook</b>	<p>Before you create your cookbook, identify your personal and professional goals. You also have to know your numbers and your sales process and necessary gates.</p> <p>When you create your cookbook, divide it into at least three buckets: client development, sales and client management. In the cookbook, outline your daily, weekly and monthly activities and behaviors. After six to 12 months, evaluate and revise the information as necessary.</p>
<b>Worksheets</b>	<p>The following worksheets are available on the Sandler Team Room site to help you write your goals and business development activities as well as things to include in your cookbook:</p> <ul style="list-style-type: none"><li>✦ <b>Cookbook Handout</b></li><li>✦ <b>Step 4: Participant Worksheets</b></li></ul>
<b>Things to Remember</b>	<p>Some things to remember about the cookbook are:</p> <ul style="list-style-type: none"><li>✦ List your personal and professional goals</li><li>✦ Identify your sales process and the necessary gates</li><li>✦ Know your numbers and be realistic</li><li>✦ Record your numbers daily and review them weekly</li><li>✦ List the proper activities and how often you will perform them</li><li>✦ Commit to doing the activities and behaviors on a daily basis</li><li>✦ Review and revise the cookbook every six to 12 months</li><li>✦ Find an accountability partner (Sandler coach, colleague or your boss), if necessary</li><li>✦ Service your existing clients</li></ul>

## Build Your Cookbook

1.	Financial Goal for this year	\$
2.	Recurring Revenue this year (total annual/ qrtly trails and fees)	\$
3.	Paid YTD	\$
4.	Paid but not received (\$ coming in next paycheck)	\$
5.	Gap (1-2-3-4*\$ still needed to hit goal)	\$
6.	\$ needed per month (5 / # months left in year)	\$
7.	Average Case Size	\$
8.	# of cases needed per month to hit monthly goal (6/7)	
9.	How many proposals are needed to close one (1) case?	
10.	How many 1 <sup>st</sup> meetings are needed to make one (1) proposal?	
11.	# of Proposals needed per month (8x9)	
12.	# of 1 <sup>st</sup> meetings needed per month (8x9x10)	

Below is the sourcing wheel for you to fill out to identify where your business is coming from. Fill out the source names on the inside of the circle and on the lines attached to the inner circle fill out the appointments needed per month from that source. On the lines on the outer circle fill out the behaviors needed per month in order to achieve the number of appointments needed from that source.



Below is an example of a cookbook for referrals:

### Source: Referrals

Asks	Names Rec'd	Dials	Reaches	Appt's Set	Appt's Kept
4	3	3	2	2	1

For example, if you need 6 appointments per month from referrals you need to be asking for referrals 24 times per month because it takes on average 4 Asks to get 1 appointment.

# VISUAL PIPELINE

**Qual. Opps** Goal: \$ \_\_\_\_\_

Name	\$ Value

Value of Qualified Opportunities: \$ \_\_\_\_\_



**Paid** Goal: \$ \_\_\_\_\_

Name	\$ Value	Date

Total # of Clients \_\_\_\_\_  
 Value of Qualified Opportunities: \$ \_\_\_\_\_

Visual Pipeline			
Mo. Goal		Close %	
Name		Value	\$
Updated			

Sell Cycle (mos.)	Avg. Sale
	Balance
\$Value Prospects	GAP
\$Value Qual. Opps	GAP
\$Value Paid	GAP
Suspects	GAP
Referral/Leads	GAP



**Prospects** Goal: \$\_\_\_\_\_

Name	Est Opportunity \$

Value of Estimated Opportunities: \$\_\_\_\_\_

**Prospects** Goal: \$\_\_\_\_\_

Name	Est Opportunity \$

Value of Estimated Opportunities: \$\_\_\_\_\_

**Suspects** Goal: \$\_\_\_\_\_

Name	1st Appt. Date

**Referral/Leads** Goal: \$\_\_\_\_\_

Name	1st Appt. Date

# THE 30-SECOND COMMERCIAL

## Structure of a 30-Second Commercial

<b>Introduction</b>		<p>Your name, company name, and type of business (if not evident by the name).</p> <p><b>Example:</b> <i>This is YOUR NAME with COMPANY NAME, a full-service financial planning firm...</i></p>
<b>Capsule Summary of your Business</b>	<b>Pain Statement</b>	<p>Pains your product/service addresses.</p> <p><b>Example:</b> <i>People call us when they are...</i></p> <p><b>Frustrated</b> with the results of their current retirement program. <b>Worried</b> that the kids won't have the funds for college. <b>Afraid</b> that they won't have enough money to retire. <b>Or just sick and tired</b> of dealing with too many different advisors.</p>
	<b>Benefit Statement</b>	<p>Solution your product/service provides.</p> <p><b>Example:</b> <i>Because we are a full service financial planning firm, we can usually help people with these issues.</i></p>
<b>Pendulum Question</b>		<p>Question to determine if your product/service is relevant to the prospect.</p> <p><b>Example:</b> <i>But I wasn't sure if these were issues that you worried about or not.</i></p>



A. List 4 –5 PAIN indicators that your clients typically express to you:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

B. Who are you: "I am \_\_\_\_\_ with \_\_\_\_\_" ("Did I catch you at a bad time? " Is this a convenient time to talk?" or, "Got a minute?")

C. Mini Up-Front Contract: Would it make sense if I tell you why I called? It'll probably take 30 seconds, and then you can decide if we continue the conversation.

D. Who are your typical clients: "we work with \_\_\_\_\_, who, before they became our clients:

Had these kinds of concerns/problems/challenges: they were ....

- ... Frustrated by ...
- ... Concerned with ...
- ... Upset because ...
- ... Under pressure because ...
- ... Mad about ...

"There's my 30 seconds, should we keep talking?"

"Now, before I go any further, I don't suppose your experiencing any of these situations?"

"Oh, really? Which one is your biggest headache/concern/challenge?"

"Can you tell me more?"

# 30-SECOND COMMERCIAL (CONT.)

## 30-Second Commercial Examples

### ***Example #1***

I work with ABC Financial in a unique division.

Typically business owners are referred to us who are frustrated with the uncertainty of future taxes. They are worried about cash-flow and the increasing cost of overhead. They are concerned that their most profitable employees will leave for better jobs and take key customers with them. Usually these owners will come to us when they already have a plan in place, but are worried that it is out of date.

We help our clients clear up some of the uncertainty and confusion for the future so they can focus on their biggest goal, generating a profit in the business.

Being as successful of a guy you are, I'm sure you already have all of these taken care of, right?

### ***Example #2***

This is Glenn Mattson. I work with ABC Financial, a full service financial planning firm.

People seek me out who are frustrated and confused by their employee benefits packages, are scared they won't be able to pay for their children's college education, and are afraid that they will outlive the dollars they have set aside for retirement or are simply tired of dealing with several different advisors with different objectives.

Because we are a full service financial services company, we can typically help people with any of these issues.

Of the items I just mentioned; which one hits home the most?

### ***Example #3***

My name is Glenn Mattson and my company is ABC Financial.

We work with individuals/business owners like you to identify leaks in their personal economies that could put more money in their pocket.

We help people that are confused about what financial strategies are best for them, people that are frustrated with paying more in taxes than they may have to, and folks worried about who they can trust to help them with those money questions... like they won't have enough money in retirement and concerned that they could be positioning their dollars to do more.



## 30-Second Commercial Worksheet

<b>Introduction</b>		
<b>Capsule Summary of your Business</b>	<b>Pain Statement</b>	
	<b>Benefit Statement</b>	
<b>Hook Question</b>		



# FROM OPPORTUNITIES TO SALES

## Five Elements for Turning Opportunities into Sales

**1**

### **MINDSET**

Set yourself up for success

Your time is valuable and it should be invested with those who truly want what you have to offer. That means stringently qualifying opportunities so you can close effectively without having to handle stalls and objections and chase prospects to obtain their decisions.

.....

**2**

### **TARGET**

Connect with your ideal prospect

Focus on prospects whose circumstances—the problems they must solve, goals they must achieve, and challenges they face—can be addressed by your product or service better than the prospects can address them on their own or with the help of any of your competitors.

.....

**3**

### **PERSPECTIVE**

Focus on outcomes

Prospects don't care about the features and benefits of your product or service. What they do care about is whether your product or service can help them achieve the outcomes they are after. When qualifying the opportunity, focus on outcomes. Save the features and benefits for your eventual presentations.

.....

**4**

### **LEVERAGE**

Provide excellent service

Providing excellent service enables your clients to achieve excellent results, which strengthens the relationships. And that opens the door for additional business and makes them excellent references and excellent sources for referrals...if you take the initiative to ask for them.

.....

**5**

### **ACTION**

Results require action

It takes motion, not meditation, to get things done. Planning is important. But, spending too much time thinking about what to do accomplishes little. Your plan and its execution doesn't have to be perfect. It only has to be "good enough." Put your plan into action immediately.

# SALES DEVELOPMENT PROCESS

## Build & Sustain the Relationship



*Creating and sustaining a comfortable atmosphere in which to do business is your responsibility. It is a process that starts the moment you say, "Hello" to a new prospect and continues throughout the relationship.*

- Developing rapport with prospects is essential. Having a sincere desire to help them solve problems, face challenges, or achieve goals facilitates the process.
- Make sure that the words you speak are congruent with your tone of voice and your facial expressions.
- Controlling the selling process is achieved by establishing up-front agreements with your prospects about the progression of the selling process and who will be responsible for what.

*Always be qualifying. The more effort you put into qualifying an opportunity, the more quickly you can develop and close it if it measures up to your qualifying criteria... or pursue another opportunity if it doesn't measure up.*

## Qualify the Opportunity



- Concentrate first on the degree of fit between what you have to offer and the prospect's problem, challenge, or goal.
- Determine if the prospect is willing and able to commit the necessary resources to acquire and use the product or service you will eventually propose.
- Before you begin working on solutions and presentations, determine exactly how your offer will be judged—and by whom.

## Close the Sale



*The objective of "closing" is to obtain a "yes" or "no" buying decision (or a decision to move to the next step in a multi-step decision process). And that objective must be established and agreed to by your prospect before you begin any work to create your presentation.*

- Closing activities only take place with prospects who have "survived" the qualifying stage and have agreed to make a decision at the conclusion of a presentation.
- Presentations should focus only on the pains uncovered earlier in the process—nothing more; nothing less.
- Post-Sell activities will "lock up" the sale and facilitate the transition of the relationship from buyer-seller to partners working toward a common goal.

# KEEP, STOP, START!

## 1st Quarter

Year End Goal: \_\_\_\_\_

CY YTD FY GDC \_\_\_\_\_  
 Goal GDC by Q3 END \_\_\_\_\_  
 Difference \_\_\_\_\_  
 Total GDC in Mill \_\_\_\_\_  
 Total GDC Hit List/Pre-Mill \_\_\_\_\_  
 TOTAL OPPORTUNITY QUARTER GDC \_\_\_\_\_

Discount 20% \_\_\_\_\_  
 Discount 40% \_\_\_\_\_

 **KEEP**

 **STOP**

 **START**


### Strategy to Maximize Resources Within Your Practice

Marketing	_____
Training	_____
eMoney	_____
Teaming/Partnership/Succession Planning	_____
Joint Work	_____
Human Resources/Kolbe	_____
Operations	_____
P&C Specialist	_____
Coaching with Christine	_____

### Weekly Metrics You Hold Yourself Accountable To

Category	Appts Scheduled		Appts Seen		GDC Written		Qualified Referrals	
Goal/Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Goal/Actual								
<b>Total</b>								

Submission date: June 15<sup>th</sup>



## 2nd Quarter

Year End Goal: \_\_\_\_\_

CY YTD FY GDC \_\_\_\_\_  
 Goal GDC by Q3 END \_\_\_\_\_  
 Difference \_\_\_\_\_  
 Total GDC in Mill \_\_\_\_\_  
 Total GDC Hit List/Pre-Mill \_\_\_\_\_  
 TOTAL OPPORTUNITY QUARTER GDC \_\_\_\_\_

Discount 20% \_\_\_\_\_

Discount 40% \_\_\_\_\_



**KEEP**



**STOP**



**START**


### Strategy to **Maximize Resources** Within Your Practice

Marketing \_\_\_\_\_  
 Training \_\_\_\_\_  
 eMoney \_\_\_\_\_  
 Teaming/Partnership/Succession Planning \_\_\_\_\_  
 Joint Work \_\_\_\_\_  
 Human Resources/Kolbe \_\_\_\_\_  
 Operations \_\_\_\_\_  
 P&C Specialist \_\_\_\_\_  
 Coaching with Christine \_\_\_\_\_

### Weekly Metrics You **Hold Yourself Accountable To**

Category	Appts Scheduled		Appts Seen		GDC Written		Qualified Referrals	
	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Goal/Actual								
Goal/Actual								
<b>Total</b>								

# 3rd Quarter

Year End Goal: \_\_\_\_\_

CY YTD FY GDC \_\_\_\_\_

Goal GDC by Q3 END \_\_\_\_\_

Difference \_\_\_\_\_

Total GDC in Mill \_\_\_\_\_ Discount 20% \_\_\_\_\_

Total GDC Hit List/Pre-Mill \_\_\_\_\_ Discount 40% \_\_\_\_\_

TOTAL OPPORTUNITY QUARTER GDC \_\_\_\_\_

 **KEEP**

 **STOP**

 **START**




### Strategy to Maximize Resources Within Your Practice

Marketing	_____
Training	_____
eMoney	_____
Teaming/Partnership/Succession Planning	_____
Joint Work	_____
Human Resources/Kolbe	_____
Operations	_____
P&C Specialist	_____
Coaching with Christine	_____

### Weekly Metrics You Hold Yourself Accountable To

Category	Appts Scheduled		Appts Seen		GDC Written		Qualified Referrals	
	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Goal/Actual								
<b>Goal/Actual</b>								
<b>Total</b>								

Submission date: December 15<sup>th</sup>



# 4th Quarter

Year End Goal: \_\_\_\_\_

CY YTD FY GDC \_\_\_\_\_

Goal GDC by Q3 END \_\_\_\_\_

Difference \_\_\_\_\_

Total GDC in Mill \_\_\_\_\_ Discount 20% \_\_\_\_\_

Total GDC Hit List/Pre-Mill \_\_\_\_\_ Discount 40% \_\_\_\_\_

TOTAL OPPORTUNITY QUARTER GDC \_\_\_\_\_

 **KEEP**

 **STOP**

 **START**




## Strategy to **Maximize Resources** Within Your Practice

- Marketing \_\_\_\_\_
- Training \_\_\_\_\_
- eMoney \_\_\_\_\_
- Teaming/Partnership/Succession Planning \_\_\_\_\_
- Joint Work \_\_\_\_\_
- Human Resources/Kolbe \_\_\_\_\_
- Operations \_\_\_\_\_
- P&C Specialist \_\_\_\_\_
- Coaching with Christine \_\_\_\_\_

## Weekly Metrics You **Hold Yourself Accountable To**

Category	Appts Scheduled		Appts Seen		GDC Written		Qualified Referrals	
	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Goal/Actual								
Goal/Actual								
<b>Total</b>								



# NOTES & COMMENTS



# NOTES & COMMENTS





# NOTES & COMMENTS



# NOTES & COMMENTS



# NOTES & COMMENTS

PLAN

EXECUTE

DELIVER

ACCOMPLISH



**GATEWAY FINANCIAL  
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