



Session 4: Planning To Achieve Your Goals

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-
- **Program GOAL:**
After 8 Sessions, You Will Have Built a **SYSTEM** You Can Use To Generate 15 (or, more) Preferrals (Preferred Introductions) a Month
 - **Get More Preferrals, NOW! . . . 8 Sessions . . . 8 Weeks**
 - Week 1: **Profile**
Gaining **CLARITY** about who you want to meet
 - Week 2: **Sources and Partners**
Identifying **WHO** can introduce you to people you want to meet
 - Week 3: **Methods**
Generating Preferrals from Sources to people you want to meet
 - Week 4: **Plan**
Creating KPI's of daily / weekly activity required to achieve your goal
 - **100% You-Must-Be-Happy Satisfaction Guarantee**
 - 4 Weeks** . . . if you've done the work but want out . . . you're off the hook / you pay nothing
 - 8 Weeks** . . . if you're not on track to meet your goal . . . you work with me, 1:1, until you do
-
- **This session focuses on: PLANNING to Help You ACHIEVE YOUR GOALS**
 - Planning is a dynamic, 10 Step Process for getting from where you are NOW to where you want TO BE
 - Achieving a meaningful GOAL is a good thing; in this program your goal is to get 15+ Preferrals / month:
 - Achieving THIS goal requires a BEHAVIORAL 'Recipe' . . . of *How Much* and *What Kind* of Behaviors will cause you to achieve this goal consistently and predictably
 - **The Four (4) Videos In Session 4**
 - Video: Introduction to Session 4
 - Video 4-A: Plan, Planning and Goal . . . What's the Difference?
 - Video 4-B: Planning To Achieve a Goal
 - Video 4-C: Planning To Achieve YOUR Goal: 15+ Preferrals / Month



Session 4: Planning To Achieve Your Goals

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Video: INTRODUCTION

- **The Content of this Session is longer than in other Sessions**
 - That's why we are using 3 videos to break up the content into 'bite-sized' elements
- **Video: Introduction**
 - Watch this to get a very brief (under 2 minute) overview of what the 3 videos in this Session 4 . . . will cover
- **Video 4-A: Plan, Planning and Goals . . . Defined**
 - This video defines each of these terms and explains the differences
- **Video 4-B: Planning To Achieve a Goal**
 - This video explains the PROCESS of planning -- getting from where you are NOW to where you want TO BE
- **Video 4-C: Planning To Achieve YOUR Goal**
 - This video helps you build a RECIPE of behaviors so you can generate 15+ Preferrals / month in the future

Video 4-A: Plan, Planning and Goals . . . Defined

- **Plan . . . Planning . . . Goal**
 - These terms are used interchangeably and often . . . incorrectly
 - "What are you PLANNING to do?" "I PLAN to retire by 55"
 - Nice, but that's really a GOAL . . . not a plan!
- **PLAN . . .**
 - a series of coordinated actions . . . designed to help you achieve a measurable result / outcome or . . . GOAL
 - a step-by-step process . . . used to help close a GAP between where you are now and want to be in the future
 - E.G.
 - "My plan is to:
 - **recruit 8 salespeople by 12/31,**
 - **train and manage the salespeople to generate \$100K in annual revenues, in order to**
 - **grow our annual revenues by 20% over the previous year"**
- **GOAL . . .**
 - is the OUTCOME or result . . . you get when you successfully carry-out or complete your PLAN
 - E.G.
 - **"grow our annual revenues by 20% over the previous year"**
- **PLANNING . . .**
 - is the PROCESS . . . of developing a PLAN that will help you achieve a measurable, meaningful GOAL
 - a dynamic process . . . consisting of 10 specific STEPS



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Video 4-B: Planning To Achieve a Goal

- **Plans are Useless**
 - “Plans are useless . . . but planning is INDISPENSABLE!” -- Dwight D. Eisenhower
 - A plan is static . . . it’s most valid . . . only for the moment and conditions that exist when it’s created
 - Planning . . . is a dynamic process that changes with time and conditions so the current plan remains valid
- **The 10 Step Planning Process**
 1. Determine where you are . . . NOW
 2. Determine where you want TO BE . . . in the future
 3. Define the GAP . . . you want to close . . . i.e. your GOAL
 4. Develop the means or PLAN . . . that will achieve the GOAL of closing the GAP you’ve described
 5. Implement the PLAN . . . and close the GAP you want to eliminate
 6. Track / Monitor your ACTIONS and . . . your RESULTS
 7. Compare your PLANNED vs. ACTUAL Behaviors and Results
 8. Analyze what’s causing any GAP you find remains
 9. Modify your METHODS . . . NOT . . . your goal
 10. Lather, Rinse and REPEAT . . . until your GOAL is achieved

Video 4-C: Planning To Achieve YOUR Goal: 15+ Preferrals / Month

- **Building Your Plan or ‘Recipe’ . . . for Success with Get More Preferrals, NOW!**
- **Steps 1 – 3: Find / Define your GAP**
 - Where are you, NOW?
 - Where do you want to be . . . IN THE FUTURE?
 - What is the GAP . . . that you must eliminate or close?
 - > If you’re generating 3 Preferrals / month now . . .
 - > If you want to be generating 15 Preferrals / month . . . in the future
 - > Then, your GAP is “12 Preferrals / month”
- **Step 4: Develop Your PLAN (the means!) . . . To Eliminate Your Preferral GAP**
 - Your plan is the total of all the actions . . . that will achieve your GOAL and eliminate your Preferral GAP
 - First, you must be ready . . . you must make it to the STARTING LINE . . . by having the following ‘in place’
 - You must be able to:
 - > **Create** a CVS PROFILE of your ‘Ideal Introduction’ (Preferral)
 - > **Identify** a potential Preferral SOURCE and a potential Preferral PARTNER
 - > **Approach** a potential Preferral SOURCE
 - > **Approach** a potential Preferral PARTNER



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Video 4-C: PLANNING TO ACHIEVE YOUR GOALS (cont.)

- > **Conduct a meeting** with a potential Preferral SOURCE
- > **Conduct a meeting** with a potential Preferral PARTNER
- > **Follow-Up** with a potential Preferral SOURCE
- > **Follow-Up** with a potential Preferral PARTNER
- > **Approach / Qualify / Process** a newly received Preferral
- > **Conduct** a bi-monthly Preferral PARTNER meeting
- > **Implement** your 'Core 4' Cultivation Plan with your Key People
- With these skills 'in place' . . . you're ready to IMPLEMENT your Preferral Generation PLAN

- **SCOPE and RATE . . . of Change**
 - Before you go any further . . . be clear about two (2) things:
 - 1) **HOW MUCH** . . . change . . . do you want?
 - > this is your GAP . . . the 'distance' your plan must cover or 'close' for you
 - 2) **HOW SOON** . . . do you want it?
 - > this determines the LEVEL of activity you must use to close your GAP
 - > the LOWER your activity level . . . the SLOWER the rate of change you'll see
 - > the HIGHER your activity level . . . the FASTER the rate of change you'll see
 - > If you want to see greater change or, sooner . . . Do MORE
 - > If you can afford to wait or, you have other priorities . . . Do LESS
 - > Ultimately . . . the choice is always **YOURS!**

- **Your Behavioral Plan (AKA 'Recipe') . . . for Generating 15+ Preferrals / Month**
 - Your two (2) ESSENTIAL behaviors:
 - 1) **Approach** . . . (and, Meet) . . . Potential Preferral **SOURCES**
 - 2) **Approach** . . . (and, Meet) . . . Potential Preferral **PARTNERS**
 - Do this adequately and consistently . . . Follow-Through . . . all will be fine!
 - The 'Side-Dishes' . . .
 - 1) Implement your **Core 4 Cultivation Plan** with your Key People
 - 2) Use your **Expert Directory™**
 - 3) Use your **Client Machine®**

- **Approach and Meet . . . with Potential Preferral Partners**
 - In order to . . . generate 15+ Preferrals / month, I will:
 - > IDENTIFY and APPROACH 2 Potential Preferral Partners / week
 - > Until I have secured 8 Preferral Partners for my business or practice



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Video 4-C: PLANNING TO ACHIEVE YOUR GOALS (cont.)

- **Approach and Meet . . . with Potential Referral Sources**
 - In order to . . . generate 15+ Referrals / month, I will:
 - > IDENTIFY and APPROACH 5 Potential Referral Sources / week
 - > for 12 weeks . . . 3 months . . . 60 workdays
 - After that, modifications will be made based on need and historical experience from the prior 3 months activity
- **Build, Use and Maintain a CORE 4 Cultivation Plan with Key People**
 - Build, schedule and maintain marketing communications needed to build awareness, preference and confidence with key people being cultivated -- e.g. prospects, clients, advocates and alliances
 - > Monthly Newsletter or Communication
 - > Quarterly Personal Glimpse / Insight Emails
 - > Quarterly Thinking-of-You Emails
 - > Quarterly KITSIMFIL Calls
- **Access, Set-Up and Use The Expert Directory™ to Build Relationships, Goodwill and Generate Referrals**
 - Log-in
 - Create / Edit your Expert Profile
 - Invite Experts
 - Find / Invite Connectors
 - Connect people for their mutual benefit . . . and, yours
- **Access, Set-Up and Use The Client Machine® to Build Top-of-Mind Awareness of You with Key People**
 - Log-in
 - Create / Edit your Profile
 - Invite Key People To Be Cultivated
 - Sit back, relax . . . The Client Machine® will do the rest . . . every week . . . on your behalf
- **Build, Use and Maintain a CORE 4 Cultivation Plan with Key People**
 - **Monthly Newsletters or Marketing Communications**
 - > You must have / use a PROCESS to coordinate the delivery and use of your Cultivation Plan materials
 - Week 1: Choose Topic/s
 - Week 2: Write Content
 - Week 3: Edit / Format Content
 - Week 4: Review Edits / Approve / Send



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Video 4-C: PLANNING TO ACHIEVE YOUR GOALS (cont.)

- **Quarterly Personal Glimpse / Insight Emails**

- > Use a similar PROCESS . . . as you used for your Newsletter
 - Pick 2 days each month when you'll create and send these
 - E.G. "The second Tuesday" of each month, I will:
 - 1) Choose . . . a POINT I'd like to make
 - 2) Write . . . a STORY to illustrate the Point I've chosen
 - 3) Edit / Rewrite . . . the COPY . . . if / as necessary
 - E.G. "The second Wednesday" of each month, I will:
 - 1) Proof-read . . . the Story / Copy
 - 2) Create . . . the actual email in my ESP, and
 - 3) Send . . . the email to the Key People I'm cultivating
- > Just be sure you get all this on your calendar . . . every, single month

- **Quarterly Thinking of You Emails**

- > Brief and highly relevant with a LINK to online content of interest / value to your key people who receive them
 - demonstrates you're thinking of them even when a 'sale' or 'referral request' is not the motivation
 - provides another way to build Awareness of you, Preference For you and Confidence in You
 - people work with people they KNOW, LIKE and TRUST . . . this does all that and then some!

- **Quarterly KITSIMFIL Phonecalls**

- > Personal, direct outreach to communicate two things to people you're cultivating for revenues and referrals
 - you CARE about the person . . .
 - you want to learn if / how you -- or, someone you know -- can be of SERVICE and ADD VALUE to them

- **AN IMPORTANT QUESTION . . . To Ask Yourself**

- WHEN . . . will you know HOW / WHEN you should be sending these marketing communications?
- It's important that you STAGGER each of these 'Core 4' touches on REGULAR basis and with RESPECT
- To do this, requires a SYSTEM . . . a SIMPLE System

- **THE (REALLY!) SIMPLE CULTIVATION SYSTEM**

- Divide the year into four (4) quarters (columns)
- Create 3 Cultivation groups (rows)
 - > Group A: Jan / Apr / Jul / Oct
 - > Group B: Feb / May / Aug / Nov
 - > Group C: Mar / Jun / Sep / Dec



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Video 4-C: PLANNING TO ACHIEVE YOUR GOALS (cont.)

- Start Month: The month someone initially 'qualifies' to be cultivated by you . . . e.g. "May"
- Start Month . . .
 - > send your **Newsletter**
 - > send your **Personal Glimpse / Insight Email**
- The Following Month . . . e.g. "June"
 - > send your **Newsletter**
 - > send your **Thinking-of-You Email**
- The Following Month . . . e.g. "July"
 - > send your **Newsletter**
 - > make a **KITSIMFIL Call**
- LATHER / RINSE / REPEAT . . . continue this rotation until you have a good reason not to do so

In this example . . . with a **Start Month** of "MAY":

- Monthly . . . The Newsletter or Marketing Communication . . . starting MAY and every month thereafter
- Quarterly . . . stagger the remaining three (3) elements of the Core 4 Cultivation Plan on a monthly basis
 - > Personal Glimpse / Insight Emails . . . Cultivation Group B: Feb / **May** / Aug / Nov
 - > Thinking of you Emails . . . Cultivation Group C: Mar / **Jun** / Sept / Dec
 - > KITSIMFIL Calls . . . Cultivation Group A: Jan / Apr / **Jul** / Oct

- **The Expert Directory™**
 - Helps you get found by people seeking what you can do through someone who knows, likes and trusts you
 - Helps you introduce other people to one another and gain goodwill in the process for doing so
 - Helps differentiate you from other providers in your field
- **The Client Machine®**
 - A 100% Done-For-You way to Keep-In-Touch and Stay-In-Mind with your Key People
 - You invite people to allow you regularly (weekly) keep-in-touch and respectfully (no pitches) . . . it does the rest
 - Week after week
- **STEP 5: IMPLEMENT YOUR ACTIVITY PLAN . . . To Achieve Your Goal of 15+ Preferrals / Month**
 - Your Weekly Activity (Behavior) Plan . . . is your foundation . . . your RECIPE . . . for Preferral Success
 - AKA . . . "How Much"? and "What Kind"? of BEHAVIOR is required, of you, for success
 - Quick Quiz: What are the only two behaviors you have 100% control over?
 - > Approaching potential _____
 - > Approaching potential _____



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Video 4-C: PLANNING TO ACHIEVE YOUR GOALS (cont.)

- **STEP 6: TRACK and MONITOR YOUR BEHAVIOR and RESULTS**
 - Old saying goes: **“You can’t manage what you don’t measure”** (i.e. TRACK) -- it’s very, very true!
 - Two categories of importance to measure . . .
 - > **BEHAVIOR** . . . INPUT . . . what you DO
 - > **RESULTS** . . . OUTPUT . . . what you GET (from what you do)
 - Key Results you want to be tracking:
 - > **APPOINTMENTS** . . . made / kept with potential Sources and Partners
 - > **MEETINGS** . . . made / kept with potential Sources and Partners
 - > **PREFERRALS** . . . generated from conversations with Sources and Partners
 - > **NOTES / LETTERS** . . . you send to newly received Preferrals
 - > **STATUS** . . . of Preferrals you meet with
 - Activate?
 - Cultivate?
 - Terminate?
 - > **FOLLOW-UPS** . . . with Sources and Partners
- **STEP 7: COMPARE YOUR EXPECTATIONS . . . PLANNED vs. ACTUAL RESULTS . . . To Find GAPS**
 - GAP . . . is a discrepancy between what you PLANNED and what you (actually) GOT or, ended up with
 - GAPS . . . are SYMPTOMS . . . that you need to pay attention to and, more important, DO something about it
 - **BEHAVIORAL EXPECTATIONS and RESULTS . . . “Planned vs. Actual”**
 - > How many potential SOURCES did you **expect** to approach? How many did you **actually** approach?
 - > How many potential PARTNERS did you **expect** to approach? How many did you **actually** approach?
 - **CONSEQUENTIAL EXPECTATIONS and RESULTS . . . “Planned vs. Actual”**
 - > **APPOINTMENTS** . . . made / kept with potential Sources and Partners
 - > **MEETINGS** . . . made / kept with potential Sources and Partners
 - > **PREFERRALS** . . . generated from conversations with Sources and Partners
 - > **NOTES / LETTERS** . . . you send to newly received Preferrals
 - > **STATUS** . . . of Preferrals you meet with
 - > **FOLLOW-UPS** . . . with Sources and Partners



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Video 4-C: PLANNING TO ACHIEVE YOUR GOALS (cont.)

• STEP 8: ANALYZE THE CAUSE/S . . . BEHIND THE GAP/S YOU FIND

- Any GAP between what you PLANNED to do/get and ACTUALLY did/got is a SYMPTOM something needs fixing!
- To fix something, you must understand WHY it is happening . . . this includes any GAP your TRACKING reveals
- The three (3) categories why GAPS exist (and, the secret to addressing and eliminating them!) is to consider:

1) START

- Something needs to be happening . . . but it's not
- You're not meeting enough of or the right kind of people?
 - Maybe you find you're not making calls and you need to start making calls to improve your results?

2) STOP

- Something is happening . . . and it needs to stop
- You're not generating Preferrals from people you believe you should be able to generate them from?
 - Maybe you're calling on 'anyone and everyone' . . . and you need to stop and be more selective?

3) IMPROVE

- Something is happening . . . but it needs to happen 'better' than it is (i.e. Quantity and Quality issues!)
- You're not generating Preferrals adequately or easily from people you feel should be more helpful?
 - Maybe your 'approach' needs to be reviewed / improved . . . and a coaching session would help?

- Tracking your behaviors and results . . . your 'numbers' . . . over time . . . allows you to
 - > generate reliable **AVERAGES** of 'How Much' behavior is required, on average, to generate a specific result
 - > see or reveal **TRENDS** over time . . . are your skills (measured by your results) improving or declining?

• STEP 9: MAKE CHANGES . . . IF / AS YOU DEEM NECESSARY

- Changes means changes in your METHODS . . . NEVER . . . your plan's ultimate GOAL
- You still want 15+ Preferrals / month, right? See . . . that is your GOAL and that's NON-NEGOTIABLE
- But if what you're DO-ing . . . is not WORK-ing . . . you need to remember the definition of 'Crazy':
 - > "Doing the same thing . . . over and over again . . . and hoping for a different / better result the next time!"
 - > You do NOT want to be . . . or, act . . . 'crazy'!
- If you must make changes, then you modify the BEHAVIORS that create the RESULTS you're getting by either:
 - 1) Modifying the QUANTITY of your behavior -- i.e. ACTIVITY LEVEL
 - generally speaking, the MORE you do UP FRONT . . . the MORE you'll generate IN THE END
 - 2) Modifying The QUALITY of your behavior -- i.e. SKILLS
 - doing something more efficiently or effectively means you can usually do more, more easily
 - 3) Modifying the NATURE or KIND of behaviors you're using to generate results
 - 4) Modifying ALL the above . . . change how much / what kind / how well you do something



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Video 4-C: PLANNING TO ACHIEVE YOUR GOAL (cont.)

- **STEP 10: LATHER, RINSE and REPEAT . . . This Planning Process**
 - Earlier, we said that the PLANNING PROCESS . . . is a dynamic, constantly changing thing
 - Your plan . . . must change . . . because the conditions it must operate in are constantly changing
 - Your plan . . . is a behavioral RECIPE . . . to help you close a GAP and achieve your GOAL
 - Each week, is a new opportunity to GROW . . . closer to your GOAL . . . by steadily closing your GAP
 - Each week is a new opportunity for you to be:
 - > **TRACKING** . . . your behaviors and your results . . . What you DO (INPUT) and What you GET (OUTPUT)
 - > **NOTING** . . . any discrepancies or GAP you find between what you expected and what you received
 - > **UNDERSTANDING** . . . the basis or cause/s for any GAP/S your weekly tracking reveals to you
 - > **REPLICATING** . . . desirable results . . . learn what is working . . . and keep doing those things!
 - > **IMPROVING** . . . on any result that is not what you want by
 - > **REVISING** . . . your **behavior** level, your **skill** level, your **kind** of behaviors . . . or, (most likely) all the above
 - > **REPEATING** . . . this process, week after week, until you achieve your ultimate GOAL
 - Thomas Edison once said, "I didn't have over 5,000 failures, I learned over 5,000 ways that didn't work!"



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Session 4 SUMMARY REVIEW

Video 4-A: Plan, Planning and Goals . . . Defined

- We began by defining and differentiating several commonly used / MIS-used terms:
 - **Planning** . . . a 10 step, dynamic PROCESS that helps you to build a PLAN
 - **Plan** . . . a series of coordinated, step-by-step actions that help you close a GAP and achieve a GOAL
 - **Goal** . . . the RESULT you get when you successfully complete or carry-out your PLAN

Video 4-B: Planning To Achieve a Goal

- Planning . . . is a DYNAMIC, ongoing PROCESS
- “Plans are useless . . . but **PLANNING** is . . . INDISPENSABLE!” -- Dwight D. Eisenhower
- Planning . . . is the way you create a PLAN . . . and, when you use and complete it fully . . . you achieve a GOAL
- Plans -- even the best-laid plans -- don’t achieve goals . . . BEHAVIORS . . . that carry out the plan . . . do!

Video 4-C: Planning To Achieve YOUR Goal

- Achieving your program goal of generating 15+ Preferrals / month requires that you do two (2) things consistently:
 - 1) **Identify / Approach and Meet** with potential **SOURCES** of Preferrals for your business or practice
 - 2) **Identify / Approach and Meet** with potential **PARTNERS** of Preferrals for your business or practice
- When (not if) you do these two ‘triggering’ behaviors, then you open a field of possibilities for yourself:
 - > By identifying and approaching a potential Source or Partner, you:
 - **may get a ‘polite declination’**
 - > don’t obsess over it . . . it happens . . . leaves more of you for the ‘best’ of the ‘rest’ of your candidates
 - **may be unable to reach someone**
 - > people are so busy . . . just keep trying to reach them . . . eventually you will
 - **may set-up a meeting or,**
 - > schedule it and email a reminder / confirmation
 - **may NOT set-up a meeting**
 - > it’s either a ‘polite decline’ or you’re not able to reach them . . . see above and act accordingly
 - > If you do get to meet with someone, you’ll seek to do or gain . . . two (2) things:
 - 1) from potential Sources . . . **Preferrals**
 - 2) from potential Partners . . . **Partners**



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Session 4 SUMMARY REVIEW (cont.)

- > When you approach a newly received Preferral, you may:
 - **make 'No Contact'**
 - > it happens; keep trying and follow-up with the Source on what (isn't) happening
 - **may get a 'polite declination'**
 - > don't obsess over it . . . it happens . . . leaves more of you for the 'best' of the 'rest' of your candidates
 - **have a meeting / conversation with your newly received Preferral**

- > When you do *actually* meet with a newly received Preferral, you may assign them to one of these statuses:
 - **RED LIGHT**
 - > It's OVER! . . . you find some 'knock-out' factor that precludes any future relationship with the person

 - **YELLOW LIGHT**
 - > they may be interested in the benefits you offer . . . SOMEDAY, but NOT TODAY
 - > they are interested in building a relationship with you . . . a know, like and trust relationship . . .
 - > when, not if, they . . . or, someone they know . . . develops a need for your kind of services, you will come to mind (**Awareness**) as a preferred provider (**Preference**) and as someone they feel they can trust to either do business with you themselves or, refer you to others who can (**Confidence**)

 - **GREEN LIGHT**
 - > they are qualified to become a possible client . . . right now!
 - > they should go into your 'Active' pipeline to be processed as a viable candidate for clienthood!

- Finally we looked at **HOW MUCH** and **WHAT KIND** of behaviors your Goal (15+ Preferrals / mo) requires of you:
 - > **APPROACH**
 - 5 Potential Sources / week
 - 2 Potential Partners / week

 - > **FOLLOW-THROUGH**
 - meet with your potential Sources and Partners
 - generate Preferrals
 - generate Partners
 - cultivate relationships with people who have the potential to do business and/or refer you to others
 - build Awareness / Preference / Confidence . . . people work with people they 'know, like and trust'
 - "Go to the bank" . . . a little more often with a lot more money to deposit! '-)



Session 4: Planning To Achieve Your Goals

Session 4 ASSIGNMENTS

- 1) **Create** a list of any questions you'd like to discuss with Bill Doerr about this program
- 2) **Complete** the Assignments below and be ready to share with Bill when you meet

GIVEN:

- The three (3) videos you've just viewed for **Session 4** of **Get More Preferrals, Now™**
- Assignment 1: 4 Core Cultivation Planning and Implementing
- Assignment 2: "Weekly Activity Planning and Reporting"
- FORM: "Core 4 Cultivation Planner"
- FORM: "Promises & Performances" Weekly Behavior Tracker

YOU WILL:

Complete the ASSIGNMENTS (see below)

ON / BEFORE:

Meeting with Bill Doerr for your Session 4 Review / Coaching Call

4-1) 4 CORE CULTIVATION PLANNING and IMPLEMENTING

Review the material on this topic found in Video 4-C, so you can do the following:

- **Choose** the four (4) contacts or 'touches' you'll use with people who qualify to be cultivated
- **Select**, but don't feel limited to, four (4) 'touches' from the following:
 - > Monthly: a brief newsletter or marketing communication of some kind (key word: BRIEF)
 - > PLUS . . . on a staggered monthly basis:
 - a 'Personal Glimpse' or Insight email
 - a 'Thinking-of-You' email
 - a KITSIMFIL (Keep-In-Touch (to) Stay-In-Touch (and make someone) Fall-In Love phonecall to people you're cultivating a relationship with to build awareness of you, preference for you and confidence in you as a provider they'll use or refer
- **Finalize** the 'Core 4' Touches you'll be using to cultivate relationships with others
- **Prepare** the Core 4 Cultivation 'touches' so you can put new people into cultivation quickly and easily when they qualify as people of interest and value for you / your business

4-2) Weekly Activity Planning and Reporting

Become 'intimately' familiar with the form provided to you for this purpose

- **Commit** to do the BEHAVIOR or INPUT goals required of you by this program:
 - > Identify and Approach 2 potential Preferral Partners / week . . . until you get 8 Partners
 - > Identify and Approach 5 potential Preferral Sources / week . . . for 12 weeks then, as your needs and historical experience (skill) suggests is needed to achieve your goal of generating 15+ Preferrals / month
- **Enter** your 'goals' or 'expectations' for the RESULTS or OUTPUT goals you want each week
- **Record** your activity in each area on a daily basis
- **Summarize** your weekly totals of both your INPUT BEHAVIORS and OUTPUT RESULTS
- **Write-Up** how your ACTUAL vs. PLANNED behaviors and results turned out . . .
 - > If you met your goal . . . WHY? HOW will you replicate that result again?
 - > If you fell short of your goal . . . WHY? HOW will you improve your results next week?
 - > If you exceeded your goal . . . WHY? HOW can that help you hit your goals next week?

Finally, be ready to discuss your readiness to begin full implementation of your GMPN principles and practices with Bill Doerr at your next weekly coaching call (Session 4). Bring your questions!!



ASSIGNMENT 4 - 1:

Core 4 Cultivation Planner

Core 4 Cultivation Planner

- Step 1:** Find the Group (A/B/C) containing the MONTH when you first decide to cultivate someone.
- Step 2:** Find the COLUMN headed by the MONTH you want to begin cultivating someone.
- Step 3:** Follow the recommended cultivation 'TOUCHES' shown for each month of the year

A			B			C					
JAN	APR	JUL	OCT	JAN	APR	JUL	OCT	JAN	APR	JUL	OCT
FEB	MAY	AUG	NOV	FEB	MAY	AUG	NOV	FEB	MAY	AUG	NOV
MAR	JUN	SEP	DEC	MAR	JUN	SEP	DEC	MAR	JUN	SEP	DEC
JAN	APR	JUL	OCT	FEB	MAY	AUG	NOV	MAR	JUN	SEP	DEC
FEB	MAY	AUG	NOV	MAR	JUN	SEP	DEC	APR	JUL	OCT	NOV
MAR	JUN	SEP	DEC	APR	JUL	OCT	NOV	MAY	AUG	NOV	DEC
APR	JUL	OCT	JAN	MAY	AUG	NOV	FEB	JUN	SEP	DEC	MAR
MAY	AUG	NOV	FEB	JUN	SEP	DEC	MAR	JUL	OCT	JAN	APR
JUN	SEP	DEC	MAR	JUL	OCT	JAN	APR	AUG	NOV	FEB	MAY
JUL	OCT	JAN	APR	AUG	NOV	FEB	MAY	SEP	DEC	MAR	JUN
AUG	NOV	FEB	MAY	SEP	DEC	MAR	JUN	OCT	JAN	APR	JUL
SEP	DEC	MAR	JUN	OCT	JAN	APR	JUL	NOV	FEB	MAY	AUG
OCT	JAN	APR	JUL	NOV	FEB	MAY	AUG	DEC	MAR	JUN	SEP
NOV	FEB	MAY	AUG	DEC	MAR	JUN	SEP	JAN	APR	JUL	OCT
DEC	MAR	JUN	SEP	JAN	APR	JUL	OCT	FEB	MAY	AUG	NOV



ASSIGNMENT 4 - 2:

Weekly Activity (and, Results!) Tracker

		Promises I Made							Performances I Delivered							Reflections
		MEETINGS kept	Partners gained	Preferrals in / out	Letters sent	Status R Y G	Follow-Ups w/ Sources	MEETINGS kept	Partners gained	Preferrals in / out	Letters sent	Status R Y G	Follow-Ups w/ Sources			
Week Starting:		set						set								
		Emails sent	Calls made					Emails sent	Calls made							
POTENTIAL PARTNERS																
1.	_____															
2.	_____															
POTENTIAL SOURCES																
1.	_____															
2.	_____															
3.	_____															
4.	_____															
5.	_____															

What did I do that worked? What didn't? WHY do I think that happened? Or, didn't? What will I keep or do differently next week?

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