

EXTRAORDINARY ADVISOR BREAKTHROUGH PROCESS MODULE #4

Name: _____

Date: _____

FOCUS Your Relationship Attention on only 40 people at one time

PLAN YOUR 90 DAY CASH FLOW AND YOUR 2 YEAR

GROWTH WITH ONE LIST:

THE MOTHER OF ALL FOCUSING TECHNIQUES

How to select these 20 and 20 - recognize the one key to all future growth and sustenance: **RELATIONSHIP**

We do not work for the government or the Water Company!

**THE MOST IMPORTANT EXERCISE ANY ENTREPRENEUR
WILL EVER COMPLETE.**

FIRST	TOP 20	(NOW) A			
Twenty CLIENTS from whom you will make and receive MOST of your income during the next 90 days:					
	Name	Phone	Strategy 1	Date 2	\$ 3
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

(GUARANTEES 90 DAY CASH FLOW)

Follow-up meeting with Kevin on this module monthly.

How to Rotate Names: Who Get's Upgraded; Fired; What To-Do with #21.

DEFINITIONS:

- 1 **Strategy** The very next thing that must be done to move this case (i.e. this relationship) to where and when YOU get paid, e.g. put into underwriting, run a hypo, send in Reg. 60 paperwork, set next appointment, call client, write a letter, ask question of my manager/compliance/ wholesaler, etc. Keep this to no more than six words.! Two is ideal.
- 2 **Date**-The date you plan to have the "strategy" completed. e.g. If strategy is a phone call to someone, why would that not happen till next week? Make this date as soon as honestly possible.
- 3 **\$** - This is the gross amount of income you will receive from this transaction: before taxes and your overhead but after any

splits with the house or other agents. Be precise.

SECOND		TOP 20		(FUTURE) B	
Twenty PEOPLE who will be MOST RESPONSIBLE for your income in the year after next!					
	Name	Phone	Strategy 1	Date 2	\$ 3
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

(GUARANTEES LONG-TERM BUSINESS SUCCESS)

Follow-up meeting with Kevin on this module monthly.

How to Rotate Names: Who Get's Upgraded; Fired; What To-Do with #21.

DEFINITIONS:

- 1 **Strategy** The very next thing that must be done to move this case (i.e. this relationship) to where and when YOU get paid, e.g. put into underwriting, run a hypo, send in Reg. 60 paperwork, set next appointment, call client, write a letter, ask question of my manager/compliance/ wholesaler, etc. Keep this to no more than six words.! Two is ideal.
- 2 **Date**-The date you plan to have the "strategy" completed. e.g. If strategy is a phone call to someone, why would that not happen till next week? Make this date as soon as honestly possible.
- 3 **\$** - This is the gross amount of income you will receive from this transaction: before taxes and your overhead but after any splits with the house or other agents. Be precise.

Present: Cash flow now.

A. **First "20" List** -
(now)

Should be ACCURATE answer you would give 90 days from today if you were asked this question: Who are the 20 clients who contributed the greatest number of dollars to your income (based on when the fee or commission money was received) over the last 90 days. Use your best practical fact-based (not wish-based) judgment.

Two Years+ from now

B. **Second "20" - List** (future)

Should be ACCURATE answer you would give one the Jan 1st following 2 years from today if you were asked this question: Who are the 20 people who most contributed, directly as clients or indirectly as centers of influence to your gross income for the year in question (at least 2 full years from now). OK to list spouse, coach, boss, mentor, etc. Start with how much you will make after all splits, etc. in 2010 (yes, '10 not '08 or '09), Visualize the clients who will be most important and active in '10. It's absolutely OK for you to make zero from these folks anytime prior to '10. Plan big, you wont' be accountable here til the end of '10. VISUALIZE, the identity of the real people.