



Wholesaler Quarterly Success Plan

*"Good fortune is what happens when opportunity meets with planning."
~Thomas Alva Edison*

For the very first time we are offering our WholesalerMasterminds.com readers our Wholesaler Masterminds® Quarterly Success Plan. This is the same plan we use in our [Wholesaler Masterminds® Private Coaching](#).

This plan is just part of the success equation. **The very best leaders, athletes, and corporate rainmakers have engaged coaches...and you should too.** To get information about coaching visit this link: [Wholesaler Masterminds Coaching](#).

Over the years we have developed an insane number of resources to assist you:

- Over 500 [blog posts](#)
- [The NEW Wholesaler Masterminds Radio Show](#) podcast or our [original show archives](#), totaling over 200 shows
- Our [Brotherhood of the Bag](#) books
- Expert scheduling assistance through [Wholesaler Masterminds Schedulers](#)
- Online learning courses available at BeMemorable.com

If you have questions about our Quarterly Success Plan or any of our services, please email me at info@wholesalermasterminds.com.

To your success,

Rob Shore
CEO/Founder
Wholesaler Masterminds®
888-508-5010

DEFINITIONS/INSTRUCTIONS:

Sales Plan Section

Sales Goal - What is your **quarterly** sales goal?

New sellers - How many new sellers do you wish to convert from prospects **this quarter**?

Other - Any other **quarterly goals** you are held accountable for (e.g. referrals to another departments or sales unit)?

Weekly Activity Goals Section

One:Ones – How many advisor one on one appointments will you complete **weekly** this quarter?

Phone Calls – Calls **per week** includes appointment setting, thank you, staying in touch, COI calls, etc. [*Reference reading: Five Calls Wholesalers Need to Start Making*](#)

Emails – How many outbound emails will you send **weekly** (includes appointment setting, thank you, staying in touch, COI calls, etc.)? [*Course information: Email Clinic and Presence in Your Absence*](#)

Drop-ins – What's your goal for drop-ins **weekly**? [*Reference reading: Advisor Drop-ins: Smart Tactic or Dumb Move?*](#)

COI Contacts – How many COIs will you **intentionally** see, call, schedule reach out to **this quarter**? [*Reference reading: Five Critical Strategies That Will Make COIs Love You*](#)

Percent Forward Scheduled – What percent of appointments with advisors will result in you asking for a forward scheduled next appointment (as a percentage of those you wish to see again) **this quarter**? [*Reference reading: Advanced Wholesaler Technique: The 8 Benefits of Forward Scheduling*](#)

Percent Asked Referral - What percent of appointments with advisors will result in you asking for a referral **this quarter**? [*Reference reading: Are Wholesalers Afraid of Asking for Referrals?*](#)

Quarterly Goals Section

Business Goals – S.M.A.R.T. goals that you plan to achieve related to business **during the quarter**. These may include product mix, sales ranking achievement, completion of certification, etc.

Personal Goals – These goals **for the quarter** are specific to your personal life. These may include goals such as visit the gym three times per week, lose five pounds, have weekly date night with significant other, etc.

Professional Development Objective – Strategy (the what), Rationale (the why), Tactics (the how)

What do wish to undertake, advance and/or complete this quarter that will improve you skills, your formal education, your depth of product knowledge, etc.? Examples: Read two business books, complete module of CIMA, ChFC, etc.

Team Objectives – Strategy (the what), Rationale (the why), Tactics (the how)

How will you improve the functionality and success of your team? That team may include simply you and your internal or may expand to include a scheduler, an assistant, etc. Example: Commit to weekly team call to discuss goals and successes. [*Reference reading: 11 Topics You Need To Be Discussing With Your Internal Partner*](#)

Quarterly Marketing Plan of Attack – Strategy (the what), Rationale (the why), Tactics (the how)

What formal marketing outreach will you undertake this quarter via email, snailmail, and/or voicemail? Consider how your PVP-Peerless Value Proposition will play a role in your campaign(s). [*Reference reading: 12 Ways Wholesalers Profitably Use Their PVP-Peerless Value Proposition®*](#)

QUARTERLY SUCCESS PLAN [[see complete instructions](#)]

Name **Region** **Plan Date**

 Sales Plan:

Production **New Sellers** **Other Goal**

 Activity Goals:

One:One **Phone Calls** **Emails** **Drop-ins** **COI Contacts**

Percent Forward Scheduled

Percent Asked Referral

 Quarterly Goals: make sure your goals are S.M.A.R.T. ([click to read about S.M.A.R.T. goals](#))

Business Goals:

Personal Goals

1.


1.


2.

2.

3.

3.

 Professional Development Objective: what's one thing you commit to doing in the quarter that will improve your skills, knowledge, etc.?

 Team Objectives: what do you wish to achieve with your territory team (internal, scheduler, assistant, meeting planner, etc.) over the next ninety days?

Strategy -

Rationale -

Tactics -


Team Objectives (continued):

1.

2.

3.

Notes:

 Quarterly Marketing Plan of Attack: what specifically will you commit to doing in the form of marketing over the next ninety days (email, snailmail, voicemail, etc.)?

How will your PVP – Peerless Value Proposition® play a role in the plan?

Strategy -

Rationale -

Tactics -

1.

2.

3.

Notes:



: (optional other critical success factor)

Strategy –

Rationale -

Tactics -

1.

2.

3.

Notes:

 Where I need the most assistance in the next 3 months is:

 The resources I need that assistance from (manager, coach, co-worker, etc.) are:

 I want to be held wholly accountable this quarter for:

 I have reviewed my annual business plan (if applicable) in the last 90 days to stay on track.

YES

NO