



Mastering Prospecting



Grow your Prospecting Team for a

Magical Future!



Your Prospecting Mastery Plan©

Your Name:

Today's Date:

Your Current Title and Responsibilities:

Who do you want to develop into top Prospectors?

- 1.
- 2.
- 3.
- 4.
- 5.



Business Questions

How will a Prospecting Team change your life?

Describe in detail your DREAM PROSPECTING TEAM:

What excites you about a Prospecting Team?

Do you believe your current team members could prospect BETTER than you?



Leadership Evaluation

Are you open to freeing up time for your team to prospect?

Are you willing to put time into training your team? Do you know how to train?

Are you willing to have DAILY meetings with your team on prospecting?

Are you committed to helping your team hit their prospecting numbers and goals?



Business Training/Growth Plan

Write your plan for training your team how to prospect.

How often will you practice Prospecting Language with your team?

How will you motivate your team to meet with prospecting goals?

How determined have you been to meet your prospecting goals?



Business Plan

Write your Business Plan For this _____ Year.

#AUM/PREMIUM you will generate this year:

#AUM/PREMIUM each team member will generate this year:

#Referrals per month generated by you:

#Prospects generated each month by your team:

Your Target Market:

Your Daily/Weekly/Month Joint Work Meetings

Team Practice Time