



Mastering Prospecting



Unlock New Skills for a

Magical Future!



Your Prospecting Mastery Plan©

Your Name:

Today's Date:

Your Current Title and Responsibilities:

Your Desired Title and/or Prospecting Responsibilities:

Why do you want to Prospect?

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



Business Questions

Your current income plus benefits and bonuses:

Future projected/desired income plus benefits and bonuses:

Describe in detail your DREAM PROSPECTING ROLE within the company:

What excites you about this Dream Role?

**Are you currently qualified for this Dream Role?
If not, what knowledge/skills/licenses do you need?**



Business Self-Evaluation

What are your strengths?

What are your weaknesses?

What are your fears about prospecting?



Business Training/Growth Plan

Write each area that needs improvement and your plan for how you will improve:

How often will you practice your Prospecting Language?

What courses will you take this year?

What books will you read this year?

What Seminars/Trainings you will attend this year?

What Licenses will you obtain this year?



Business Plan

Write your Business Plan For this _____ Year.

#AUM you will generate this year:

#Prospects per month

Your Prospecting Method(s)

Your Target Market

**Your Daily/Weekly/Monthly Prospecting
Schedule**

Your Daily/Weekly/Month Joint Work Meetings

Your Practice Time