2019 PRODUCTION AND NEW CLIENT ACQUISITION GOAL WORKSHEET

We created this worksheet to help you determine how many new clients you'll need to generate with your seminar marketing campaigns to meet your 2019 production goals. Once you've completed the worksheet, let's get together to put your 2019 marketing plan in place to make this year your best year EVER!

2019 Sales Goals (Line 1)		Average Sale (Line 2)	Total Clients (Line 1 ÷ Line 2)
Product	Amount		
Life & Annuity Premium:	$_____	÷ $_____	= _____
Investment Products AUM: (Traditional and Alternative)	$_____	÷ $_____	= + _____
TOTAL :	$_____		Total Clients Neded _____

New Client Marketing Goals:

Now that you know how many clients you need, contact your Seminar Marketing Consultant at LeadingResponse to put together a seminar marketing schedule that will help you get the new clients you need to meet your 2019 production goals!

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BETTER PROSPECTS. BETTER RESULTS.

2019 SEMINAR EVENT PLANNING CALENDAR

GEAR UP YOUR PRODUCTION

- Digital Campaigns
- Targeted Direct Mail
- Guaranteed Risk-Free Seminar Programs

LeadingResponse

Better Prospects.
Better Results.

1ST QUARTER

NO EVENTS | GOOD EVENT DATES | CAUTION, CALL US

JANUARY

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

1/1 - New Year's Day
1/21 - Martin Luther King Day

ADVISOR TIP: Holidays are over and your prospects are thinking about their taxes, worried about how much they owe Uncle Sam. Address this in your marketing messaging.

HOT TOPIC: RETIREMENT & ESTATE PLANNING

FEBRUARY

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

2/14 - Valentine's Day
2/18 - Presidents' Day

BEST PRACTICES: Inviting your best clients to your seminars can help you convert more attendees to appointments.

HOT TOPIC: TAXES & RETIREMENT

MARCH

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

3/6 - Ash Wednesday
3/17 - St. Patrick's Day • 3/21 - Purim

ADVISOR TIP: Change is GOOD! Make sure your marketing topics are RELEVANT to what's going on in the economy and your local market.

HOT TOPIC: RETIREMENT & ESTATE PLANNING

2ND QUARTER

NO EVENTS | GOOD EVENT DATES | CAUTION, CALL US

APRIL

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

4/15 - Tax Returns Due
4/21 - Easter • 4/27 - Passover

BEST PRACTICES: Send seminar reservation confirmation letters to each prospect, AND, thank you letters to everyone who attends your seminars.

HOT TOPIC: ESTATE PLANNING

MAY

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

5/12 - Mother's Day
5/27 - Memorial Day

ADVISOR TIP: Check with your LeadingResponse Marketing Consultant for our great and popular summer specials!

HOT TOPIC: RETIREMENT PLANNING

JUNE

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

6/9 – 6/10 – Shavuot
6/16 - Father's Day

BEST PRACTICES: Summer seminars work! Capture prospects from your competitors who are taking the summer off.

HOT TOPIC: RETIREMENT PLANNING

LeadingResponse **SEMINAR EVENT PLANNING CALENDAR • PROVIDING EXPERIENCE & CONSULTING SINCE 1995**

3RD QUARTER

NO EVENTS | GOOD EVENT DATES | CAUTION, CALL US

JULY

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

7/4 - Independence Day

ADVISOR TIP: Call your LeadingResponse Marketing Consultant to set up your lead generation campaigns for the rest of the year.

AUGUST

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

8/11 - Tisha B'Av

BEST PRACTICES: Change or add a new restaurant to hold your seminars. We have a database of best performing locations in your area.

HOT TOPIC: RETIREMENT PLANNING

SEPTEMBER

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

9/2 - Labor Day
9/30-10/1 - Rosh Hashanah

ADVISOR TIP: Contact your LeadingResponse Marketing Consultant today to request a post-seminar "Responder Insights Report."

4TH QUARTER

NO EVENTS | GOOD EVENT DATES | CAUTION, CALL US

OCTOBER

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

10/14 - Columbus Day • 10/9 - Yom Kippur • 10/14-10/20 - Sukkot
• 10/21 - Shmini Atzeret • 10/22 - Simchat Torah • 10/31 - Halloween

BEST PRACTICES: Our 1-on-1 Appointment Setting solution is a powerful lead generation alternative to seminars during the holidays.

HOT TOPIC: RETIREMENT AND ESTATE PLANNING

NOVEMBER

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

11/1 - All Saint's Day • 11/11 - Veterans Day
11/28 - Thanksgiving

ADVISOR TIP: Don't lose the production "points" or "perks" you've accumulated throughout the year! Use them now to finish the year strong!

HOT TOPIC: WILLS & TRUSTS, RETIREMENT PLANNING

DECEMBER

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

12/23-30 - Chanukah • 12/24 - Christmas Eve
12/25 - Christmas Day • 12/31 - New Year's Eve

BEST PRACTICES: It takes 30-35 days to plan and execute your campaigns, so start planning your January campaigns now!

HOT TOPIC: ESTATE PLANNING & RETIREMENT INCOME PLANNING

IMPORTANT: (TIMING IS CRITICAL)

Your Completed Order Forms Should Be Submitted 35 Calendar Days Prior To Your First Seminar Date. Tuesdays And Thursdays Are The Best Days To Hold Your Events.

CALL US TODAY AT 1-800-795-2773

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