

**Creating a 12-Month
Personal and Business Plan
Worksheets and Resources
with**

Joseph Stumpf

Creating a 12-Month Personal and Business Plan

Table of Contents

Introduction	3
Part One: My Best Me	
Seven Steps to Writing a 12-Month Personal Plan, Overview	4
Step 1. Where are you now? Integral Life Wheel	5
Integral Life Wheel: Definitions	6
Step 2. What improvement has to happen? SMART goals	7
Steps 3-7. Personal Development Worksheets.....	8-25
Part Two: My Best Business	
Seven-Step Business-Planning Process, Overview	26
Step 1. Monthly Revenue Goal and Transaction-to-Revenue Ratio	27
Step 2. Define Your 5-6-7	28
Step 3. Close the Gap	28
Step 4. Choose the Most Productive Program/Campaign.....	29
Step 5. Action Plans	
Before Unit	30
During Unit	31
After Unit	32
Step 6. Break Through Resistance	33
Step 7. Get Going Now!	33

**Creating a 12-Month
Personal and Business Plan
Worksheets and Resources**
with
Joseph Stumpf

A 12-Month Personal and Business Plan

A major purpose of taking the risk of being an entrepreneur is to create a better life for yourself and the ones you love. In this program, you are going to take the time to choose what you want in your life. I promise you that if you choose to follow this powerful process exactly the way I designed it, you will experience You at Your Best!

Experience shows that far too many agents and lenders create the business plan first and, if there is any time left over, they include their life. This method usually leads to burnout and a loss of living purposefully.

The main reason to go through the planning process is to focus your life and business so you can move in the direction of the highest version of yourself. Another reason is to avoid the pain and confusion of insignificant drift.

In his keynotes and recordings, world-class motivational speaker and sales trainer Zig Ziglar often talks about the importance of having meaningful, specific goals. And he drives home his point with the rhetorical question,

What would you rather be in life, a meaningful specific or a wandering generality?

Without clear goals and plans to achieve them, you are in danger of becoming a wandering generality. With a well-thought-out set of goals and detailed follow-through plans, you have a much better chance of becoming a meaningful specific.

It's your choice.

Use this workbook as you listen to the accompanying CDs in your Jump Start Kit or from the Web site. You'll find important clarifications to help you keep focused, and you'll have all the worksheets you'll need to plan your "best me" and your "best business."

The Seven Steps to Writing a 12-Month Personal Plan: Overview

Step 1. Where are you now? Use the Integral Life Wheel (page 5) as a visual guide to help you assess where you are now in the nine key areas of your life. You can fill out your wheel as you listen to the CD, “My Best Me,” included in your JumpStart Kit.

After you’ve completed your Integral Life Wheel and finished listening to “My Best Me,” you’ll do steps two through seven for *each* of these nine key areas. Work on these one at a time until you’ve completed all nine. Personal Development Worksheets are provided for each area on pages 8 through 25 of this workbook.

Step 2. What improvement has to happen for you to be happy with your progress, and how can you make that into a goal statement? Focus on one small, personal, incremental improvement in each of the nine areas of your Integral Life Wheel. Develop a SMART goal for each improvement. You can find guidelines for developing SMART goals on page 7 of this workbook.

Step 3. What is important about _____, to you? Take the time to discover your 5-6-7 for each of your nine goals. Worksheets are provided on pages 8 through 25 of this workbook, adjacent to your Personal Development worksheets.

Step 4. What will it look like when it’s done? In 100 words or less, write a vision statement describing what your life will look like, feel like, and sound like as if you’ve already achieved your goal in each of the nine areas of your personal life.

Step 5. What are your action steps for your “Daily Doables”? Commit to one simple “Daily Doable” for each of your nine areas, and write this on your Personal Development Worksheet. Make this Doable a ritual in your daily life.

Step 6. What is your affirmation? On the worksheet, write an affirmation to read daily to reprogram your thought patterns.

Step 7. What are your “personal mantras” for desired changes in your life dimensions? Create a personal mantra that you can repeat every day to help you bring about your desired changes.

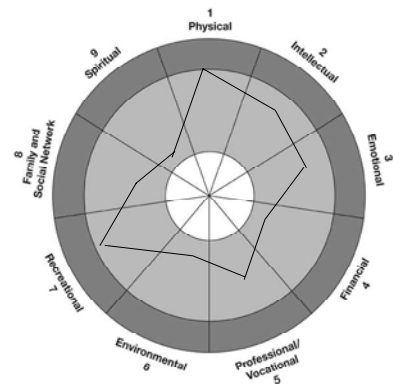
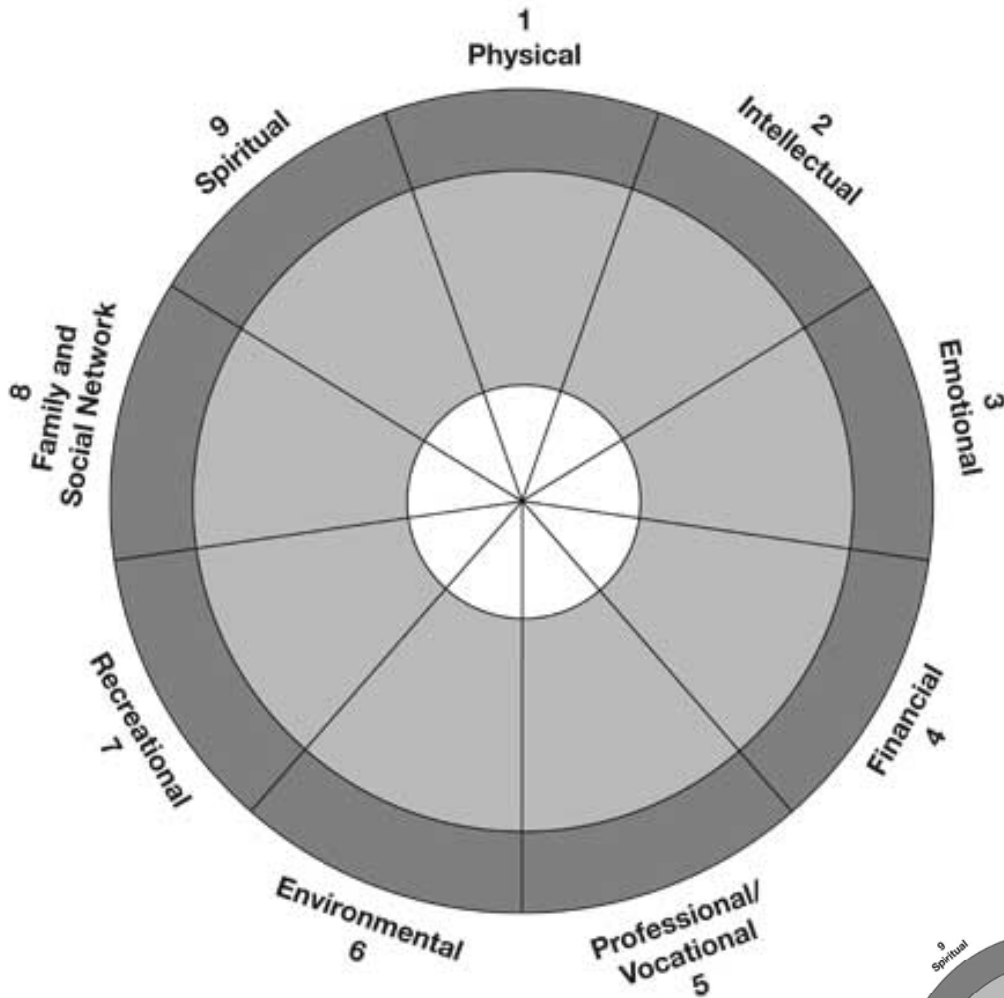
The Integral Life Wheel

Step 1. Where are you now?

Purpose: To increase your awareness of what matters most to you, where you are currently spending your time and where you want to spend more time – according to you.

Map your current position with regard to each of the life dimensions. Rate on a scale from “1” to “10” (with “1” low and “10” high) how well you are doing in each of the life dimensions.

Identify areas that you’d like to work on. Set goals on select areas for improvement.



Completed Example

The Integral Life Wheel: Term Definitions

The Integral Life Wheel serves as a perfect visual guide to help you assess where you are now in the nine key areas of your life.

- 1. Physical.** Living a fuller, more active and dynamic life; stamina and strength, including both your muscular and skeletal strength; endurance; eating habits and diet.
- 2. Intellectual.** Analytical problem-solving skills; processing information; making choices based on facts; identifying new directions of using your brain in science, art, music, studying, reading, and learning; absorbing and assimilating new ideas; using your left brain to learn technology and expand your possibilities.
- 3. Emotional.** Emotional intelligence; ability to be authentic and vulnerable; emotional balance; ability to get quiet and find your feelings.
- 4. Financial.** Money and how you relate to it; philosophy for how you relate to money; your investment portfolio, savings accounts, payables, receivables; retirement preparation.
- 5. Professional.** Professional growth – are you in Survival, Stability, Success, or Significance? Identifying what you need to learn to grow and expand professionally; organization; discipline; joy and freedom in your profession; time spent in your unique ability.
- 6. Environmental.** Includes your home, neighborhood, community, state, and even your region; level of happiness with your current environment; home size, floor plan, views, furniture, work space; level of productivity in your environment.
- 7. Recreational.** Time for personal review, renewal and improvement; ability to recover fully in between periods of high input; hobbies; engagement in active Recovery Time.
- 8. Family and Social Network.** Connectedness to your inner circle of people who mean the most to you in your life; family, friends, sphere of influence; social activity.
- 9. Spiritual.** Faith; connection to your Divine source of strength, inspiration and guidance; choices that enrich you and give a more meaningful dimension to your life; membership in a community with other people who share a similar path and are contributing to your life in a way that makes you more of who you want to be.

Step 2. What improvement has to happen for you to be happy with your progress, and how can you make that into a goal statement?

For each of your nine areas, you'll identify an area for improvement and write a SMART goal for that area. Here is a review of the definition of a SMART goal. Use the following worksheets to record your responses.

SMART goals are **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**imely

SMART goal example: To increase my physical stamina and reduce my body weight by 20 pounds, I will join a health club by January 2 and work out three days a week for the next six months.

S = Specific

A specific goal has a much greater chance of being accomplished than a general goal.

To include the specifics in your goal, you must answer the six "W" questions:

- Who: Who is involved?
- What: What do I want to accomplish?
- Where: Identify a location.
- When: Establish a time frame.
- Which: Identify requirements and constraints.
- Why: Specific reasons, purpose or benefits of accomplishing the goal.

M = Measurable

Establish concrete criteria for measuring progress toward attaining each goal you set. To determine if your goal is measurable, ask questions such as, How much? How many? How will I know when it is accomplished?

A = Attainable

You can identify ways you can make your goals come true. You develop the attitudes, abilities, skills, and financial capacity to reach your goals, and you begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals.

R = Realistic

To be realistic, a goal must represent an objective toward which you are both willing and able to work. A goal can be both high and realistic; you are the only one who can decide just how high your goal should be. Your goal is probably realistic if you truly believe you can attain it.

T = Timely

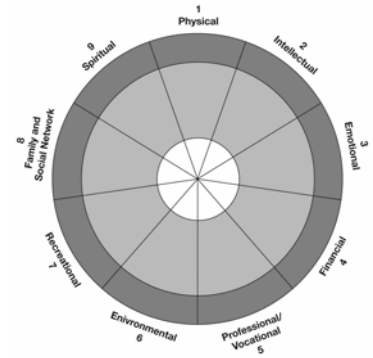
A goal should be grounded within a time frame to create a sense of urgency around it, and to set your unconscious mind in motion to begin working on the goal.

T can also stand for **Tangible**. A goal is tangible when you can experience it with one of the senses, that is, taste, touch, smell, sight or hearing. When your goal is tangible you have a better chance of making it specific and measurable and thus, attainable.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Physical Life**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Physical Life

What's important about my Physical Life, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Physical Life

7.

6.

5.

4.

3.

2.

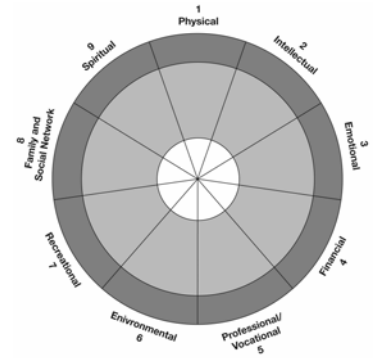
1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Intellectual Life**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Intellectual Life

What's important about my Intellectual Life, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Intellectual Life

7.

6.

5.

4.

3.

2.

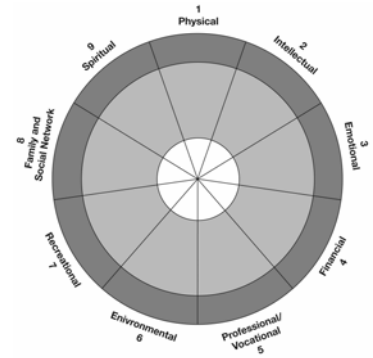
1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Emotional Life**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Emotional Life

What's important about my Emotional Life, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Emotional Life

7.

6.

5.

4.

3.

2.

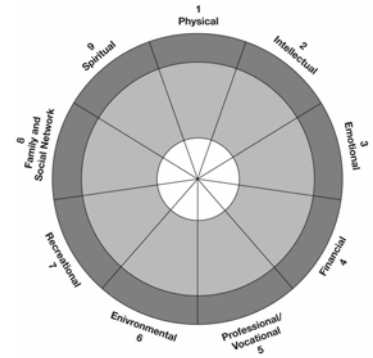
1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Financial Life**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Financial Life

What's important about my Financial Life, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Financial Life

7.

6.

5.

4.

3.

2.

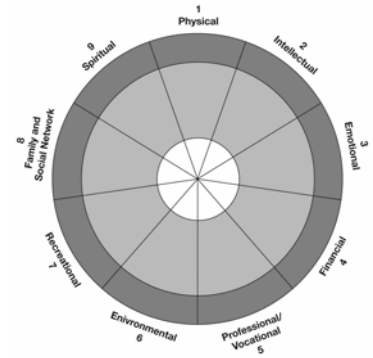
1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Professional/Vocational Life**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Professional/Vocational Life

What's important about my Professional/Vocational Life, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Professional/Vocational Life

7.

6.

5.

4.

3.

2.

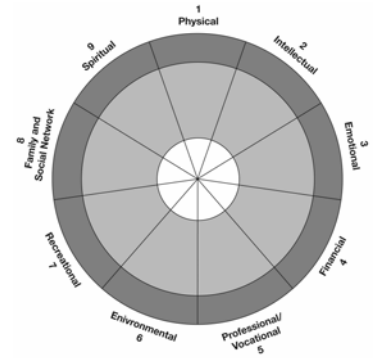
1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Environmental Life**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Environmental Life

What's important about my Environmental Life, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Environmental Life

7.

6.

5.

4.

3.

2.

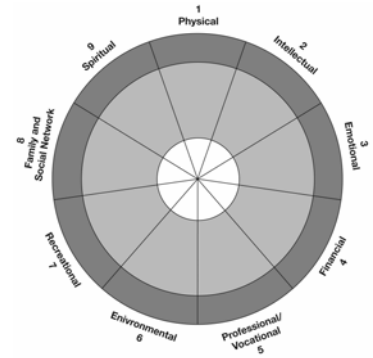
1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Recreational Life**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Recreational Life

What's important about my Recreational Life, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Recreational Life

7.

6.

5.

4.

3.

2.

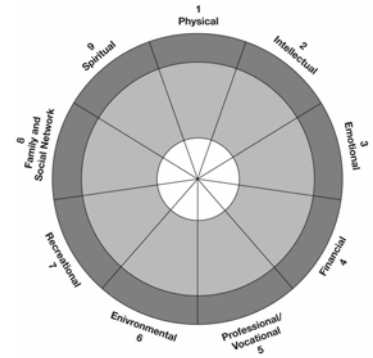
1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Family and Social Network**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Family and Social Network

What's important about my Family and Social Network, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Family and Social Network

7.

6.

5.

4.

3.

2.

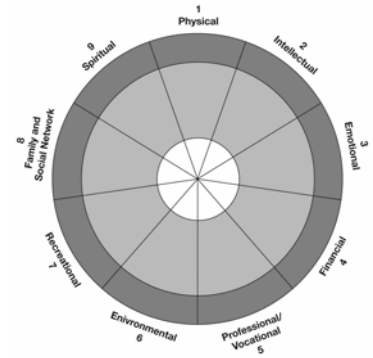
1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Creating a 12-Month Personal and Business Plan, Part I:

Personal Development Worksheet

Today's Date:



Life Dimension Area of Focus: **Spiritual Life**

Where I am now:

What improvement has to happen for me to be happy with my progress in the next 12 months?

My SMART Goal:

My 5-6-7 about what's important to me about reaching this goal. (Use the ladder on the following page to determine your 5-6-7):

5:

6:

7:

My Vision (in 100 words or less):

My Daily Doable (a new habit or practice to support achieving progress):

Affirmation: I love the thought that I'm ...

My Mantra:

Spiritual Life

What's important about my Spiritual Life, to me?

Record your response in the Number 1 box. Then ask yourself the question, "What's important about (fill in the answer from the Number 1 box), to me? Record your answer in the Number 2 box, above. Continue this process until all boxes contain your responses. The top three boxes are your 5-6-7 – transfer your responses to your worksheet.

Spiritual Life

7.

6.

5.

4.

3.

2.

1.

If you need more space for **Step 4 (What will it look like when it's done?)**, use the space below to brainstorm your vision.

Part II: My Best Business

To create your Best Business in alignment with BY REFERRAL ONLY principles, it's important to

1. Make a **90-minute commitment** to work on your business plan, focusing on your plan development for at least one 90-minute block of time each week until you've completed your plan.
2. Understand the common language of **bankable results**:
 - a. **Lead Generation**: Your business model will attract low-cost, high-quality Five-Star Prospects.
 - b. **Appointments**: You'll convert your Before, During, and After leads to appointments, where you will begin to develop relationships with prospects, using the Initial Consultation.
 - c. **Contracts**: You'll convert prospects to clients as a result of your Initial Consultation.
 - d. **Closing**: You'll be skilled in helping clients sell and/or purchase a home, obtain a purchase loan, or refinance a property.
 - e. **Referrals**: Your overall purpose is referrals, and you will develop systems in your Before, During, and After Units to gain introductions to others who wish to buy, sell, or borrow.

The Seven-Step Business-Planning Process, Overview

Step 1. Determine Monthly Revenue Goal And a Transaction-to-Revenue Ratio.

Identify the amount of money you need to solve your problems and determine the number of transactions you need each month to attain this goal.

Step 2. Define Your 5-6-7. Discover what is important about (monthly income), to you.

Step 3. Close The Gap Between Where You Are and Where You Want To Be, and Fully Experience Your 5-6-7! Identify the single quickest action you can take to gain momentum in your business.

Step 4. Pick the Most Productive System to Work on Right Now. Determine whether you should concentrate on your Before, During, or After Unit, using the planning sheet on page 29.

Step 5. The 10-Step Action Plans for Systematizing Your Business. This workbook contains a specific action plan for your Before, During, and After Unit. Select the action plan for the system you've chosen to implement.

Step 6. Break Through All Your Resistance to Getting Started Now. Examine the four mistakes that hold you back and eliminate these from your work environment to produce the most immediate, bankable results.

Step 7. Get Going Now! Be sure to post your progress on the Message Board and get support from Joe, Dean, and other members.

Listen to the "My Best Business" CD in your Jump Start Kit and use this workbook to develop your plan.

Step 1. Determine Monthly Revenue Goal And a Transaction-to-Revenue Ratio.

As you listen to the “My Best Business” CD from your Jump Start Kit or the Web site, use this page to take notes on the five mistakes to avoid as you develop your monthly revenue goal.

Mistake #1: Setting an annual income goal.

Mistake #2: Underestimating the predictability power of your Before Unit.

Mistake #3: Underestimating the size of the team that is required when you set goals.

Mistake #4: Trying to do more business instead of achieving your monthly goal in less time.

Mistake #5: Too much time planning and not enough time acting.

Monthly Revenue Goal

Write your monthly revenue goal: _____. This is the amount of money you will need to earn each month to solve your problems.

Write how many transactions you will need to complete each month to reach your revenue goal: _____

Determine your Transaction-to-Revenue Goal using this formula:

Monthly Goal:	÷	Average Commission:	=	Number of Transactions per Month:
----------------------	----------	--------------------------------	----------	--

(For example, if your monthly revenue goal is \$7,500 and your average commission is \$2,000, you will need 3.75 (or 4) transactions each month to attain that goal (\$7,500 divided by \$2,000 = 3.75).

Step 2. Define Your 5-6-7. Discover what is important about (monthly income), to you.

Ask yourself this question as you did in your personal planning and record your responses below.

What's important about my (monthly income), to me?

7.

6.

5.

4.

3.

2.

1.

Step 3. Close the gap between where you are and where you want to be, and fully experience your 5-6-7!

Now that you've identified your 5-6-7 regarding your monthly income, determine the single, fastest action you can take to close the gap between where you are and where you want to be.

Where I am: _____

Where I want to be: _____

Close the gap action: _____

Step 4. Pick the most productive system/program/campaign to work on right now.

What is the fastest, most productive system/program/campaign I can install that will generate leads right now so I can move in the direction of my 5, 6 and 7?

Imagine you were an outside consultant for your business and you had to make a recommendation to your business for what to do to produce the fastest results. Now imagine that as a consultant, you don't get paid your consulting fee unless what you recommend produces the desired result. Based on this information, what action do you need to take first?

Before Unit?	During Unit?	After Unit?
<p>The goal of the Before Unit is to generate low-cost, high-quality appointments that become clients in your During Unit. You have three turnkey programs in your Before Unit:</p> <ul style="list-style-type: none">• 30-Day Lead Blitz Program• The Art of Finding, Getting and Selling Listings (<i>GettingListings</i>)• <i>FindingBuyers</i> Program (available June 2008)	<p>Do you have a current client you could call today and ask to introduce you to a person who is interested in buying, selling or borrowing now?</p> <p>If the answer is "Yes," make that call!</p> <p>Dedicate one hour a day to make these "Hour of Power" phone calls.</p> <p>When each call is complete, evaluate the progress you've made toward reaching your monthly income goal.</p>	<p>You can look at your After Unit and ask yourself: If you needed to get a lead today, how many people would you be able to call and confidently ask for an introduction to a person who will buy, sell or borrow in the next 90 days?</p> <p>Have you built enough relationship equity with enough people that you have permission to rely on them for their introductions? The goal of the After Unit is to systematize a 20% return on relationships. So if you have 150 people and you generate a 20% yield, that would be 30 transactions over the course of a year. Can you start right here because you have the relationship equity?</p>
↓	↓	↓
<p>My Commitment: I will begin in the _____ Unit. After you have committed to your unit, go directly to the action plan for that unit in the following pages.</p>		

Step 5. The 10-Step Before Unit Action Plan Checklist

- Step 1. Go to www.MyByReferralOnly.com and review each Before Unit program.
- Step 2. Pick one program, based on your needs.
- Step 3. Create a Do Group. Listen to The Purpose Of a Do Group Training (November 9, 2007 BY REFERRAL ONLY blog).
- Step 4. Read all the threads on the Member Message Board for the program you are starting.
- Step 5. Start a program when you're 100% prepared to finish what you start.
- Step 6. Report weekly on your progress to your Do Group.
- Step 7. Post your questions on the Community Message Board.
- Step 8. Keep your Coach informed on each call and be open for direction.
- Step 9. Call 800-950-7325, ext. 4 if you need inspiration or guidance in between coaching calls.
- Step 10. Celebrate your success and learn from your failures.

The 10-Step During Unit Action Checklist

- Step 1. Pick one of the seven components of the During Unit you will work on.

Seven During Unit Components

When you build your During Unit you have seven components you can use to create a systematic process that yields a 50% referral rate:

1. **Basic Touchpoints:** This is all set up in the *myClients Referral Management System*. The first thing to do is ensure each person who buys, sells or borrows with you has a consistent experience.
2. **Basic Dialogues:** This is the level one core BY REFERRAL ONLY Initial Consultation.
3. **Planting Referral Seeds:** These are your casual conversation skills
4. **Asking For Referral Dialogues:** This is using the BRAG and ACTS scripts
5. **Handling Resistance Dialogues:** These dialogues provide powerful responses to prospect and client resistance.
6. **Advanced Touchpoints:** Only after you have mastered the basics, add more advanced touchpoints.
7. **Advanced Initial Consultation Dialogues:** These are level two dialogues, when you're ready for mastery and taking your referral rate in the During Unit up to 70% to 80%.

- Step 2. Go to www.MyByReferralOnly.com and find all the training on the process you have chosen to systematize.

- Step 3. Create a Do Group. Listen to *The Purpose Of a Do Group Training* (November 9, 2007 BY REFERRAL ONLY blog).

- Step 4. Read all the threads on the Member Message Board for the program you are starting.

- Step 5. Start a program when you're 100% prepared to finish what you start.

- Step 6. Report weekly on your progress to your Do Group.

- Step 7. Post your questions on the Community Message Board.

- Step 8. Keep your Coach informed on each call and be open for direction.

- Step 9. Call 800-950-7325, ext. 4 if you need inspiration or guidance in between coaching calls.

- Step 10. Celebrate your success and learn from your failures.

Continue to repeat the 10-step process until you are using all seven components and fully optimizing your potential in the During Unit.

The 10-Step After Unit Action Checklist

Step 1. Use the sample 30 Touchpoint Timeline to schedule After Unit touchpoints in *myClients* for your Top 150. Mark the month you will send each touchpoint; then go forward in your calendar and schedule Remodel Time and Results Time to prepare mailings and make phone calls.

Sample 30 Touchpoint Timeline

	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Monthly Evidence of Success (12)	X	X	X	X	X	X	X	X	X	X	X	X
Monthly Client Newsletter w/Letter From The Heart (12)	X	X	X	X	X	X	X	X	X	X	X	X
One Thanksgiving Day Card											X	
One Anniversary Card/Congratulations Call								X				
One Client Event Invitation/RSVP Call												X
Three FORD Telephone Calls	X				X				X			

Step 2. Go to www.MyByReferralOnly.com and find all the training on the process you have chosen to systematize.

Step 3. Create a Do Group. Listen to The Purpose Of a Do Group Training (November 9, 2007 BY REFERRAL ONLY blog).

Step 4. Read all the threads on the Member Message Board for the program you are starting.

Step 5. Start a program when you're 100% prepared to finish what you start.

Step 6. Report weekly on your progress to your Do Group.

Step 7. Any questions you have, come to the Community Message Board and ask.

Step 8. Keep your Coach informed on each call and be open for direction.

Step 9. Call 800-950-7325, ext. 4 if you need inspiration or guidance in between coaching calls.

Step 10. Celebrate your success and learn from your failures.

Step 6. Break Through All Your Resistance to Getting Started Now

As you listen to the “My Best Business” CD, take notes on the mistakes that can hold you back from success. Create an environment that will set you on the path to success in achieving your goals.

Mistake #1: Being Interrupt-Driven

Mistake #2: Too Many Tolerations

Mistake #3: Unaware of Your Opportunity Cost

Mistake #4: Not Aware of your Unconscious Weakness

Step 7. Get Going Now!

The entire BY REFERRAL ONLY community is dedicated to your success. Post your progress and questions on the Message Board, where you can get the best advice from Joe, Dean, the Coaches, and other community members. If you need immediate help, call the Coaching hotline at 800.950.7325, ext. 4.