



2016 Wholesaler Business Plan Template

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

Most wholesalers don't have a business plan and don't know where to start. With that idea in mind, here's your complimentary **2016 Wholesaler Business Plan Template**.

It's the same one that I have used to raise billions of dollars.

And remember, the plan is just part of the success equation. **The very best leaders, athletes, and corporate rainmakers have engaged coaches...and you should too.**

Get information about [Wholesaler Masterminds Coaching](#) and then contact me directly at shorespeak@gmail.com with any questions.

They also remain students of the business. Start by reading the 100's of posts at the [Wholesaler Masterminds Blog](#), listening to [Wholesaler Masterminds Radio](#), and **getting our BRAND NEW wholesaling book [Brotherhood Of The Bag: The Sunday Night Edition](#)**.

Finally, be sure to get the [info about Wholesaler Masterminds NEW scheduling service!!](#)

If you have questions about any of the components of the plan email me at shorespeak@gmail.com.

To your success,

Rob Shore



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External Wholesaler:	
Internal Wholesaler:	
Territory Name:	



Section 1: Situation Analysis and Assumptions

Situation Analysis

Describe the current business environment within your territory from both a qualitative and quantitative standpoint.

Number of Available Reps:	
Number of Producing Reps:	
Total Year-to-Date Production:	
Average Year-to-Date Production per Month:	
Number of Firms with Selling Agreements:	



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Assumptions

Describe each account's current status to include management issues (internal), product issues/opportunities, competitive issues, etc.



Section 2: 2016 Sales Goals

Sales Goals by Territory

2016 Territory Sales Goals:

Sales Goals by Product

Product Line	2016 Goal (\$)

Sales Goals by Firm

📖 **Read:** [5 Critical Strategies: COIs Will Love You](#)

Firm	2015 Actual (\$)	2016 Goal (\$)
Total	\$ 0	\$ 0

Sales Goals by Month/Quarter

	Jan (\$)	Feb (\$)	Mar (\$)	Q1 Total
Projected				\$ 0
Actual				\$ 0
	Apr (\$)	May (\$)	Jun (\$)	Q2 Total
Projected				\$ 0
Actual				\$ 0

Mid-Year Projected: \$ 0
Mid-Year Actual: \$ 0

Sales Goals by Month/Quarter (cont)

	Jul (\$)	Aug (\$)	Sep (\$)	Q3 Total
Projected				\$ 0
Actual				\$ 0

	Oct (\$)	Nov (\$)	Dec (\$)	Q4 Total
Projected				\$ 0
Actual				\$ 0

2016 Projected: \$ 0 **2016 Actual:** \$ 0

Top 50 Focus Reps

 **Read:** [How Much Love Should Wholesalers Give To Top Producers?](#)

Rep	Firm	2015 Actual (\$)	2016 Goal (\$)

Top 50 Focus Reps (cont)

Rep	Firm	2015 Actual (\$)	2016 Goal (\$)

Top 50 Focus Reps (cont)

Rep	Firm	2015 Actual (\$)	2016 Goal (\$)



Section 3: Top 25 Prospect List

Top 25 Prospects

The following 25 Reps do not do business with you currently but do significant business in your territory. Your objective is to turn these individuals into producers in 2016.

 **Read:** [12 Traits: Your Preferred Advisor](#)

Rep	Firm	City/State	Strategy

Top 25 Prospects (cont)

Rep	Firm	City/State	Strategy



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Section 4: Strategies and Rationale

External Wholesaler

Describe the strategies you will employ in order to achieve your sales goals. **BE SPECIFIC.**
 Please provide both the Rationale for each Strategy as well as the Tactics you plan to undertake.

Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	

Internal Wholesaler

Describe the specific strategies you will employ working with your internal to achieve the stated territory goals. **BE SPECIFIC.** Please provide the Rationale and Tactics for each Strategy.

 **Read:** [14 Guaranteed Ways to Achieve Success with Your Internal Wholesaler](#)

Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	
Strategy:	
Rationale:	
Tactics:	

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THE SUNDAY NIGHT EDITON





Section 5: Weekly Activity Objectives

Weekly Activity Objectives

The following is the average weekly activity projected for your territory in 2016.

Activity	Number per Week
One-on-One Meetings:	
Branch Sales Meetings:	
Client Meetings:	
Public Seminars:	
Branch Conference Calls:	
Other:	



Section 6: Obstacles and Contingency Plans

Obstacles and Contingency Plans

What obstacles do you anticipate that could negatively impact your ability to meet your sales goals? What is (are) your contingency plan(s) to deal with these obstacles?

BE SPECIFIC.

Obstacle:	
Contingency Plan:	

Obstacles and Contingency Plans (cont)

Obstacle:	
Contingency Plan:	
Obstacle:	
Contingency Plan:	
Obstacle:	
Contingency Plan:	



Section 7: Call Rotation

Call Rotation

List the cities you will travel during each week of the rotation. Space is provided for an eight-week rotation, however, the size of your geographic area may dictate a longer (8 week) or shorter (4 week) rotation.

Download the [Rotation Builder Spreadsheet](#) to optimize your rotations!!!

Read: [Do You Get Dirty in Your Territory's Data?](#)

Watch: [Free and Fast Way for Wholesalers to Map Advisor Locations](#)

Week 1:	
Week 2:	

Call Rotation (cont)

Week 3:	
Week 4:	
Week 5:	
Week 6:	
Week 7:	
Week 8:	



Section 8: Personal and Professional Development Goals

Goals

List 10 goals, both personal and professional that you have for the year ahead. Make certain that the goals you set are S.M.A.R.T.

- S**pecific
- M**easurable
- A**ttainable
- R**ealistic
- T**ime Bound

For more information about S.M.A.R.T. goals read [Wholesaler S.M.A.R.T. Goal Setting](#)

Goals (cont)

Goal 1:	
Goal 2:	
Goal 3:	
Goal 4:	
Goal 5:	
Goal 6:	
Goal 7:	
Goal 8:	
Goal 9:	
Goal 10:	



Section 9: Budget

2016 Budget

What methods will you employ to stay within the allotted budgets?

 **Read:** [25 Entertaining Ideas Wholesalers Use with Advisors](#)

 **Read:** [16 Essential Wholesaler Travel Website Resources](#)

Travel (\$):	
Comments:	

Entertainment (\$):	
Comments:	

Premiums (\$):	
Comments:	

Want to do a better job of tracking your spending and staying on budget?

Pick up the exclusive [Wholesaler Masterminds® Expense Tracker](#)



Section 10: Divisional or National Sales Manager

Divisional or National Sales Manager

What support would you like to receive from and how does your manager best create value for your region?

 [7 Essential Wholesaling Skills Your Manager Wants You to Have](#)



Section 11: Technology Utilization

Technology Skills

Describe your level of proficiency and address any additional training needs for the following areas of technology.

 [84 iPhone and iPad Apps Wholesalers Can Use](#)

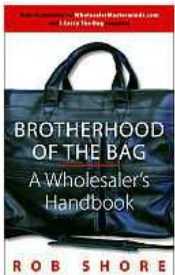
Outlook	
CRM (Salesforce, etc)	
iPad/Smart Phone	
Social Media (LinkedIn, etc)	
Web 2.0 (using RSS technology, cloud based solutions, etc.)	



*"Great Read!
 I'd consider Brotherhood of the Bag a must read
 for any wholesaler looking to improve their practice."*

Jim Ruff
 President- Retired
 OppenheimerFunds Distributors, Inc.

see what's inside at Amazon.com





Section 12: PVP – Peerless Value Proposition®

Peerless Value Proposition

What separates you from the sea of wholesaling sameness?

Know this: It's not your product and it's not your service.

It's that extra added 'something' that we called your PVP – Peerless Value Proposition®

 **Watch:** [Why Wholesalers Need A Great PVP-Peerless Value Proposition®](#)

List your five most compelling attributes – these are generally the things that you suggest advisors will find most valuable in developing a relationship with you. Examples include your ability to speak to public customers, train staff members, or craft complex case solutions.

Not sure what a PVP should be?

 **MP3 Audio:** [Creating and Marketing Your PVP - Peerless Value Proposition®](#)