

Game Plan Document

GAME PLAN

(Used With Serious Brokers)

1. Purpose Of Meeting (Establish Game Plan and Relationship)
2. Learn about them and their WHY (F.O.R.M. -Family, Occupation, Recreation, Money "Why") 7 Levels Of Why Sheet Attached.
3. Recognize their strengths and how that will benefit them in DAC.
4. Explain Value and Commitment of "Serious Partner" or "Project"
 1. Team Leaders Will Give Special Support and Attention, In Exchange For Commitment, Work Ethic and Coach-ability.
 2. Everyone is Busy, and We Don't Want To Waste Each Other's Time.
5. Promote the Value of the Proven DAC Systems - Customer Acquisition and Agency Team Growth Process. (no guessing, results based, strength in unity, all learn from the experts).
 1. The goal is to become duplicated at client acquisition, leading a team, and identifying other leaders - "Client Funnel, Broker Funnel and Leader Funnel"
 2. Duplicated leaders create other leaders (Multiplication of Revenue = "Business Ownership Benefits").
 3. Duplication of Leaders occurs from system understanding, usage, and teaching it to others. Remember your "Leadership Pipeline".
 4. Goal - Learn, Understand, and Use the DAC system to Identify those who want to lead.
6. Trainings Quickly Reviewed
 1. Certification (any clarification of content needed)
 2. Funding Training Module
 3. Recruiting Training Module (if Team Builder)
 4. Comp Plan (Personal Commission Ladder -and Override Spread)
7. How Much Income Desired*? 90 Days? One Year? Full Time Interest?
8. How Much Time Willing To Invest? (Congruent with Income Goal?)
9. Is Immediate Income Needed? If Yes, Business Funding is focus (paid weekly and immediately)

continued on next page

GAME PLAN

Funding Personal Commission Plan

1. Desired Monthly Income = _____.

2. Income _____ ÷ _____%(Tier)
= _____ BR Need.

Example: Your goal is \$10,000 Per month. We suggest you use 50% since you will be at 50% Personal Commission Tier soon. The Total Personal BR you would need per is \$20,000/month..

Tier	Commission %	# Clients	Total Personal Bonus Revenue (TPBR)	Title	Ongoing Qualification
18	80%	20	\$300,000	NMO - National Marketing Organization	QCB*
17	77.5%	18	\$250,000	SGA4	QCB*
16	75%	16	\$200,000	SGA3	QCB*
15	72.5%	14	\$150,000	SGA2	QCB*
14	70%	12	\$100,000	SGA - Supervising General Agency	QCB*
13	67.5%	10	\$90,000	MGA 4	QCB*
12	65%	9	\$80,000	MGA 3	QCB*
11	62.5%	8	\$70,000	MGA 2	QCB*
10	60%	7	\$50,000	MGA - Managing General Agency	Certified Broker
9	57.5%	6	\$25,000	GA8	QCB*
8	55%	5	\$10,000	GA7	QCB*
7	52.5%	4	\$7,500	GA6	QCB*
6	50%	2	\$5,000	GA5	QCB*
5	47.5%	2	\$3,000	GA4	QCB*
4	45%	1	\$2,000	GA3	QCB*
3	42.5%	1	\$1,000	GA2	QCB*
2	40%	Certified	N/A	GA-General Agency	Certified Broker
1	10%	N/A	N/A	RP-Referral Partner	Renew Each Year.

3. Total BR _____ ÷ \$4,000 = _____ clients/mo.

Example: 20,000 BR ÷ \$4,000 = 5 Clients : Note: A typical Bank Breezy larger funding BR amount is \$4,000. Your average may be higher or lower depending on the types of clients you are approaching.

4. Total # Clients _____ x 80 = _____ Total Owner Conversations per month.

Example: 5 Clients x 80 = 400 Conversations. Note:, 80% of applicants are eligible for funding, and 70% of those accept the offer. That means roughly 1 in every 2 applications results in funding. Typically, 40 business owner conversations lead to 1 application, so you can expect about 80 conversations per funding on average. Many business owners will fund with you later, but you should also find some who are ready for funding immediately.

NOTE: the above numbers assume 50% BR. As soon as you begin getting customers, you go up the Personal Commission Tiers - → 42.5% → 45% → 47.5% → 50%, etc etc up to 80%.

5. How Will You Accomplish That Activity Level Each Month?

6. Conversations Per Day? _____

7. Daily feedback of activity agreed to (via Text or phone):

1. Daily Conversation Activity Goal?
2. Actual Activity?
3. What Accounts For Difference?
4. What Can Be Learned?

You don't rise to the level of your goals—you fall to the level of your systems. Let's build a system that wins.

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Your Why?

(Going Seven Levels Deep)

1. What is important to you about becoming successful?



2. Why is it important for you to



3. Why is it important for you to



4. Why is it important for you to



5. Why is it important for you to



6. Why is it important for you to



7. Why is it important for you to



What would your life look like if you reached that why?

NAME:

DAC ID#:

USERNAME::



PERSONALIZED GAME PLAN

ENROLLER:

PHONE#:

EMAIL:

YOUR WHY

DAILY HABITS SCORECARD

On a daily basis, give yourself a score of 1 to 5 on the following statements. A "1" is low, and a "5" is high. The goal isn't to be perfect; it's to become more self-aware of the habits which matter most for reaching long-term success.

_____ **CLARITY**

I knew my "why" and live intentionally today.

_____ **PRODUCTIVITY**

I word things that matter most today.

_____ **ENERGY**

I managed my mental and physical energy well.

_____ **INFLUENCE**

I guided or treated others well today.

_____ **NECESSITY**

I have it was necessary to be my best and made success a "must".

_____ **COURAGE**

I shared myself, thoughts, and feelings today.

INCOME GOALS

YEARLY: _____ BY DATE: _____

MONTHLY: _____ BY DATE: _____

AVG. MONTHLY ACTIVITY NEEDED

_____ TOTAL MEET/GREET CONVERSATIONS: _____ TOTAL BIZ OWNER CONVERSATIONS:

AVG. DAILY ACTIVITY NEEDED

_____ TOTAL MEET/GREET CONVERSATIONS: _____ TOTAL BIZ OWNER CONVERSATIONS:

HOW TO YOU INTEND TO ACCOMPLISH:

4 QUESTIONS TO ANSWER DAILY

- 1.Today's activity goal?
- 2.What was the reality?
- 3.What accounts for the difference?
- 4.What can be learned?

A FAVORITE QUOTE OR THOUGHT:

Your habits shape your destiny. Track them. Learn. Adjust. Win.

YOUR WHY



DAILY ACTIVITY SHEET

DAY:

MEET / GREET ACTIVITY:

BIZ OWNER CONV:

DAILY CONTACTS

GOAL: _____ ACTUAL: _____

1	  
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EVENING JOURNAL

1. A moment I appreciated about today...
2. A situation or task i handled well today...
3. Something I learned today was...
4. I could have made today even better if...
5. If I was my own high performance coach, I would tell myself this statement about today...

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PRODUCTIVITY

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I guided or treated others well today.

NECESSITY

I have it was necessary to be my best and made success a "must".

COURAGE

I shared myself, thoughts, and feelings today.

DAILY QUESTIONS:

1. Today's activity goal?
2. What was the reality?
3. What accounts for the difference?
4. What can be learned?

SHARE RESULTS WITH YOUR ENROLLER

You don't rise to the level of your goals—you fall to the level of your systems. Let's build a system that wins.