

Fill out an implementation plan for each MAP you have chosen.

1. Why did you choose this MAP, and do you have a natural connection to this MAP?

2. How familiar are you with the target audience this MAP represents?

3. What do individuals in this MAP want/need/value? Is there a potential pain point for you to approach these individuals?

4. How will you appeal to individuals in this MAP? In other words, why should they meet with you?

5. Will this MAP generate appointments in the near term or longer term?

Near Term Long Term

6. How many qualified leads do you currently have for this MAP? With-in the next 60 days?

Leads now: _____ Leads in next 60-days: _____

7. How many appointments per week do you anticipate getting from this MAP?

8. What specific action steps will you take to get appointments with leads in this MAP?

9. What are the scripts you are going to use to appeal to this audience?

10. What will be your biggest challenge with implementing this MAP to get appointments with qualified leads?

11. What are your biggest opportunities with this MAP?

12. How much time will you spend daily/weekly to implement this MAP?

13. What do you expect the average prospect in this MAP to have in investible assets?

14. How many new households and assets do you believe this MAP will provide?