



WORKSHOP PLANNING CALENDAR

✓ OPTIMAL DATES ⚠ CAUTIONARY DATES ✗ NOT OPTIMAL DATES

1st QUARTER

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 1/20 - Martin Luther King Day						

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	29
2/14 - Valentine's Day 2/17 - Presidents' Day • 2/26 - Ash Wednesday						

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				
3/17 - St. Patrick's Day						

2nd QUARTER

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		
4/8 - 4/16 - Passover 4/12 - Easter • 4/15 - Taxes Due						

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						
5/10 - Mother's Day 5/25 - Memorial Day						

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				
6/21 - Father's Day						

3rd QUARTER

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						

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					

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			
9/7 - Labor Day 9/27 - 9/28 - Yom Kippur						

4th QUARTER

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
10/12 - Columbus Day 10/31 - Halloween						

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 Saints' Day • 11/3 - Election Day 11/11 - Veterans Day • 11/26 - Thanksgiving						

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		
12/10-12/18 - Chanukah • 12/24 - Christmas Eve 12/25 - Christmas Day • 12/31 - New Year's Eve						



2020 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 workshop marketing campaigns to meet your 2020 production goals.

2020 Sales goals (Line 1)	Average Sale (Line 2)	Total Clients (Line 1 ÷ Line 2)
Life & Annuity Premium: \$ _____	÷ \$ _____	= _____
Investment Products AUM \$ _____ (Traditional and Alternative)	÷ \$ _____	= + _____
TOTAL : \$ _____		Total Clients Needed: _____

NEW CLIENT MARKETING GOALS:

Now that you know how many clients you need, contact your DMI Workshop Marketing Coordinator to put together a schedule that will help you get the new clients you need to meet your 2020 production goals.

ADVISOR TIP:

Frequency is important. Your workshop marketing plan should include a long-term strategy to maximize your annual production.

Maintain your professional image and manage your online footprint by avoiding religious & political debates online.

BEST PRACTICES:

A start time of 6:30PM will boost attendance, as it gives people more time to get to the venue.

Summer workshops work! Capture prospects from your competitors who take the summer off.