



RESOURCES

# 2021 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 2021 production goals.

2021 Sales goals (Line 1)	Average Sale (Line 2)	Total Clients (Line 1 Line 2)
Life & Annuity Premium: \$ _____	÷ \$ _____	= _____
Investment Products AUM: \$ _____ (Traditional & Alternative)	÷ \$ _____	= + _____
<b>TOTAL:</b> \$ _____		<b>TOTAL CLIENTS NEEDED:</b> _____

### 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 2021 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 between 11am-1pm provides the best attendance for virtual workshops.

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