

The 20-Point System Template



Are you engaging in revenue-generating activities as much as you should be?

As you grow your business and spend more and more time supporting your client base, it's easy to stop doing the activities that made you a successful financial advisor in the first place. With the 20-Point System, you can easily refocus your efforts on the high-impact activities that are more likely to generate business for you and hold yourself accountable for earning 20 points each week.

This sample spreadsheet is offered as a starting point. Determining what your own revenue-generating activities are is the first step in developing a personalized system that allocates your time and energy toward profitable actions.

Week of:

Point goal: 20

Total points earned:

Activity	Point Value	Mon	Tue	Wed	Thu	Fri
Referrals:						
Ask for an introduction	1	_____	_____	_____	_____	_____
Ask for an introduction and get one	2	_____	_____	_____	_____	_____
Ask for an introduction, get one, and set up a meeting	3	_____	_____	_____	_____	_____
Send a handwritten thank-you card to a referrer	1	_____	_____	_____	_____	_____
Send a gift to a client who has made 5+ referrals	3	_____	_____	_____	_____	_____
Other		_____	_____	_____	_____	_____
Networking:						
Give a business card to a stranger	1	_____	_____	_____	_____	_____
Attend a Rotary meeting or Chamber of Commerce event	4	_____	_____	_____	_____	_____
Other		_____	_____	_____	_____	_____
Strategic Alliances:						
Meet with a potential strategic alliance	3	_____	_____	_____	_____	_____
Meet with an existing strategic alliance	4	_____	_____	_____	_____	_____
Refer a client to a strategic alliance	1	_____	_____	_____	_____	_____
Work with a strategic alliance on a mutual client's issue	3	_____	_____	_____	_____	_____
Attend a BNI meeting	2	_____	_____	_____	_____	_____
Other		_____	_____	_____	_____	_____

Activity	Point Value	Mon	Tue	Wed	Thu	Fri										
Sales:																
Complete a sale	3	_____	_____	_____	_____	_____										
Complete a sale that generates annual revenues of \$5,000+	5	_____	_____	_____	_____	_____										
Other		_____	_____	_____	_____	_____										
Client Meetings:																
Conduct a face-to-face meeting with an A client	4	_____	_____	_____	_____	_____										
Conduct a face-to-face meeting with a B client	3	_____	_____	_____	_____	_____										
Conduct a face-to-face meeting with a C client	2	_____	_____	_____	_____	_____										
Other		_____	_____	_____	_____	_____										
Client Marketing:																
Send a newsletter to 50 clients and prospects	2	_____	_____	_____	_____	_____										
Send a direct mail letter to 20 prospects	1	_____	_____	_____	_____	_____										
Send a market commentary to 50 clients and prospects	2	_____	_____	_____	_____	_____										
Contact an A or B client about a timely topic	1	_____	_____	_____	_____	_____										
Send a handwritten birthday card	1	_____	_____	_____	_____	_____										
Host a client appreciation event	10	_____	_____	_____	_____	_____										
Send a handwritten holiday card	1	_____	_____	_____	_____	_____										
Send a client survey to 50 clients	5	_____	_____	_____	_____	_____										
Other		_____	_____	_____	_____	_____										
Public Relations:																
Email a story idea to a reporter	1	_____	_____	_____	_____	_____										
Call a reporter to pitch an article	3	_____	_____	_____	_____	_____										
Get published (circulation of 25,000 or less)	5	_____	_____	_____	_____	_____										
Get published (circulation of 25,000 or more)	10	_____	_____	_____	_____	_____										
Other		_____	_____	_____	_____	_____										
		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Mon</th> <th style="width: 15%;">Tue</th> <th style="width: 15%;">Wed</th> <th style="width: 15%;">Thu</th> <th style="width: 15%;">Fri</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> <td style="text-align: center;">_____</td> </tr> </tbody> </table>					Mon	Tue	Wed	Thu	Fri	_____	_____	_____	_____	_____
Mon	Tue	Wed	Thu	Fri												
_____	_____	_____	_____	_____												
Total points earned each day:		_____	_____	_____	_____	_____										

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