

# Representative Practice Plan



**Carte**  
Financial Group

# Next 90 days



## Day Goals

No. of focus days \_\_\_\_\_  
 No. of free days \_\_\_\_\_  
 No. of buffer days \_\_\_\_\_  
 No. calls per focus day \_\_\_\_\_

## Corporate Goals

No. of corporate calls \_\_\_\_\_  
 No. of corporate seminars \_\_\_\_\_  
 No. of corporate calls per focus day \_\_\_\_\_

## Client Goals

No. of client calls \_\_\_\_\_  
 No. of client reviews \_\_\_\_\_  
 No. of referrals \_\_\_\_\_  
 No. of new clients \_\_\_\_\_  
 No. of public seminars \_\_\_\_\_  
 No. of client calls per focus day \_\_\_\_\_



## 3 Relationship Building Activities

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

## Incentives

Carrier	Product	Criteria	Goal

# Key to Success

## 3 Key Activities

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

## 3 Key Habits

- 1 1<sup>st</sup> 21 days: \_\_\_\_\_
- 2 2<sup>nd</sup> 21 days: \_\_\_\_\_
- 3 3<sup>rd</sup> 21 days: \_\_\_\_\_

## 3 Key Procedures

- 1 1<sup>st</sup> 21 days: \_\_\_\_\_
- 2 2<sup>nd</sup> 21 days: \_\_\_\_\_
- 3 3<sup>rd</sup> 21 days: \_\_\_\_\_


“We are what we repeatedly do. Excellence, then, is not an act, but a habit”.

- WILL DURANT -

# Planning Worksheet

 **Income Goal (90 days) \$** \_\_\_\_\_

	No	Expected Income
New Clients _____	<input type="text"/>	_____
Client Reviews _____	<input type="text"/>	_____
New Corporations _____	<input type="text"/>	_____

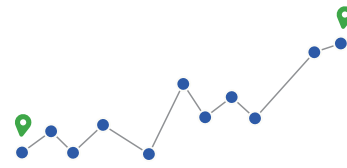
 **Calls Per Focus Day (90 days)** NaN

Number of Focus Days	<input type="text"/>	(a)	<p><b>Calls Per Days</b></p> $\frac{(b) + (c) + (d)}{(a)} = \text{NaN}$
Number of New Clients * 10	<input type="text"/>	(b)	
Number of Client Reviews * 3	<input type="text"/>	(c)	
Number of New Corp * 25	<input type="text"/>	(d)	

 **Public Seminars (90 days)**

Seminar No.	Date	Topic	Expected Attendance
1			
2			
3			
4			
5			

# Key to Success



Client Review (90 days)

Client Name	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Client Name	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	



Top 20 Relationships

Client Name	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Client Name	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	

## Relationship Builder

1

2

3

# Life Plan

## Other Activities

	Activity	Delegate	To Whom?
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

To Do (list 3 things you've been putting off)

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

New Capacity: What 3 technological advances can you implement?

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

# 90 days Review



## Other Activities

	Goal	Results
1	Income	
2	Focus Day Goals	
3	Client Goals	
4	Corporate Goals	
5	Relationship Building	
6	Incentives	
7	Key Activities	
8	Habits	
9	Procedures	
10	Delegation	
11	To Do	
12	New Capacity	

## Lesson Learned



\_\_\_\_\_



\_\_\_\_\_



\_\_\_\_\_

**Setting goals** is the first step in turning the invisible into the visible.

-TONY ROBBINS



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#experiencecarte