

Heather's Q4 Plan

“I have one power. I never give up” - Batman

Client Review

Client Review Q3 (Jul-Sep)

Current Clients: 6 (vs. Q3: 2)

Client	Recurring \$	Total Revenue Collected
AE International	\$1,350	\$4,050
STG	\$1,950	\$5,850
Kickass Masterminds	\$695	\$2,585
LifetimeVibe	\$700	\$2,100
Rhino Foundation Systems	\$3,500	\$3,500
Thirst Drinks	\$250	\$250
Total	\$8,445 (vs. Q2: \$3,300)	\$18,335 (vs. Q2: \$10,600)

Client Goals 2019

Q3 Goal: \$11,000 in Recurring Revenue

- Did not meet this goal :(
- Only added 1 new client @ \$250 (other clients were closed at beginning of Q3)

Q4 Goal: \$10,000 in Recurring Revenue

Conservative Q4 Goal: Don't lose any clients (stay at \$7750)

Client Goals 2019 (Revenue Breakdown)

Q1

- Target Recurring Revenue: \$3,750/mo
- Jan- \$1250
- Feb- \$2500
- Mar- \$3750
- Total Target Revenue: \$7,500

(Actual Recurring: 3,300)

(Actual Total: 10,750)

Q2

- Target Recurring Revenue: \$7,500/mo
- Apr- \$5000
- May- \$6250
- Jun- \$7500
- Total Target Revenue: \$18,750

(Actual Recurring: 3,300)

(Actual Total: 10,600)

Q3

- Target Recurring Revenue: \$9,000/mo
- Jul- \$7,995
- Aug- \$7,995
- Sep- \$7,995
- Total Target Revenue: \$24,000

(Actual Recurring: 8,445)

(Actual Total: 18,335)

Q4

- Target Recurring Revenue: \$10,000/mo
- Oct- \$7,750
- Nov- \$8,450
- Dec- \$10,250
- Total Target Revenue: \$26,450

(Up sell & Add 1 Sliver client)

2019 Total: \$66,135

Conservative Client Goals 2019 (Revenue Breakdown)

Q1

- Target Recurring Revenue: \$3,750/mo
- Jan- \$1250
- Feb- \$2500
- Mar- \$3750
- Total Target Revenue: \$7,500

(Actual Recurring: 3,300)

(Actual Total: 10,750)

Q2

- Target Recurring Revenue: \$7,500/mo
- Apr- \$5000
- May- \$6250
- Jun- \$7500
- Total Target Revenue: \$18,750

(Actual Recurring: 3,300)

(Actual Total: 10,600)

Q3

- Target Recurring Revenue: \$9,000/mo
- Jul- \$7,995
- Aug- \$7,995
- Sep- \$7,995
- Total Target Revenue: \$24,000

(Actual Recurring: 8,445)

(Actual Total: 18,335)

Q4

- Target Recurring Revenue: \$10,000/mo
- Oct- \$7,750
- Nov- \$7,750
- Dec- \$7,750
- Total Target Revenue: \$23,250

(Assuming everyone pays)

2019 Total: \$62,935

Client Goals 2019 (Package Breakdown)

Q1

- 1 Silver (\$1950)
- 1 Bronze (\$1350)
- 1 Bronze (\$700)

- Silver: 1
- Bronze: 2

(Actual: 1 Silver, 1 Bronze)

Q2

- 1 Silver (\$2475)
- 1 Silver (\$1950)
- 1 Bronze (\$1350)
- 1 Bronze (\$1025)
- 1 Bronze (\$700)

- Silver: 2
- Bronze: 3

(Actual: 1 Silver, 1 Bronze)

Q3

- 1 Gold (\$3500)
- 1 Silver (\$1950)
- 1 Bronze (\$1350)
- 1 Bronze (\$1195)
- **2 Bronze (\$700)**

- Gold: 1
- Silver: 1
- Bronze: 4

**(Actual: 1 Gold, 1 Silver, 3
Bronze, 1 Copper)**

Q4

- 1 Gold (\$3500)
- **2 Silver (\$1950)**
- 1 Bronze (\$1350)
- **1 Bronze (\$1,400)**
- 1 Copper (\$250)

- Gold: 1
- Silver: 2
- Bronze: 4
- Copper: 1

(Up sell & Add 1 Silver client)

**Average Revenue Per
Client: \$1,500**

Conservative Client Goals 2019 (Package Breakdown)

Q1

- 1 Silver (\$1950)
- 1 Bronze (\$1350)
- 1 Bronze (\$700)

- Silver: 1
- Bronze: 2

(Actual: 1 Silver, 1 Bronze)

Q2

- 1 Silver (\$2475)
- 1 Silver (\$1950)
- 1 Bronze (\$1350)
- 1 Bronze (\$1025)
- 1 Bronze (\$700)

- Silver: 2
- Bronze: 3

(Actual: 1 Silver, 1 Bronze)

Q3

- 1 Gold (\$3500)
- 1 Silver (\$1950)
- 1 Bronze (\$1350)
- 1 Bronze (\$1195)
- **2 Bronze (\$700)**

- Gold: 1
- Silver: 1
- Bronze: 4

**(Actual: 1 Gold, 1 Silver, 3
Bronze, 1 Copper)**

Q4

- 1 Gold (\$3500)
- **1 Silver (\$1950)**
- 1 Bronze (\$1350)
- 2 Bronze (\$700)
- 1 Copper (\$250)

- Gold: 1
- Silver: 1
- Bronze: 3

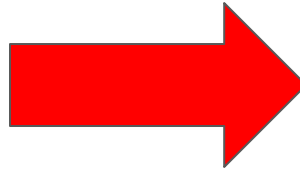
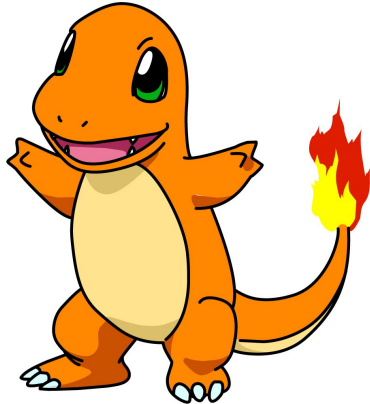
(End Q4 without losing clients)

**Average Revenue Per
Client: \$1,500**

Client Goals 2020

At the end of 2020 I want to be at \$15,000 in recurring revenue

2020 Revenue Goal \$126,000 (Q1:\$27,000 Q2:\$30,000 Q3:\$33,000 Q4:\$36,000)



Sales Points Plan

	Not point values		Points		Numbers here are quantity not point values						Points	
	Jun 19		Q2 Summary		Jul 19		Aug 19		Sep 19		Q3 Summary	
Activities	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	Actual
Attend a BNI meeting, jump lunch, other networking event	5	6	15	15	6	5	5	7	5	8	16	20
Have a 1 to 1	3	4	9	14	3	4	3	3	3	9	9	16
Attend a Jump Summit or equivalent	0	0	0	0	0	1	1	1	0	0	2	4
Create a pool. 1 point per attendee	3	4	9	4	0	0	4	20	4	24	8	44
How many times did you contact a referral source?	3	10	9	20	6	7	6	11	6	1	18	19
Write an article. Post on Sebo site. Link to it on Social	0	0	0	0	0	0	1	0	0	0	1	0
Cold call - 1 point per quality conversation	0	0	0	0	0	0	0	0	0	0	0	0
Extra hour spent on PPL, Test & Pro Bono clients	3	5.25	4.5	7.875	5	13.5	5	4.25	5	2.25	7.5	10
Teach or guest speak at an event	0	1	0	2	0	0	0	1	0	0	0	2
Get Analytics access	3	0	9	6	2	1	2	0	2	2	6	3
Send an Analytics audit / proposal	3	3	18	20	2	1	2	3	2	3	12	14
Talk to a potential client - phone or email	6	6	18	28	4	6	4	11	4	7	12	24
Meet with a potential client - at Sebo or at their office	2	1	12	10	2	0	2	1	1	0	10	2
Meet with a potential client - take them to lunch / golfing / activity	0	0	0	0	0	0	0	0	0	0	0	0
One off or Website Sales	1	0	3	0	0	0	0	0	0	0	0	0
Discuss a higher package with an existing, recurring client	0	0	0	0	0	1	0	0	0	0	0	2
New Recurring or Up-sell a higher package	0	1	0	2	1	1	1	1	0	1	4	6
How many additional points would you like to add to your goal?	0	0	0	0	0	0	0	0	0	0	0	0
Total	32	41.25	106.5	128.875	31	40.5	36	63.25	32	57.25	105.5	166

Monthly Sales Points Plan

Attend BNI Meeting/ Networking Lunch	16
Have a 1 to 1	9
Attend a Jump Summit	1
Pools	8
Contact Referral Source	18
Write an Article & Post on Sebo	1
Extra Hour on Test Clients	15
Analytics Access	6
Send Audit/Proposal	6
Talk to Potential Via Phone/Email	12
Meet W/ Potential	5
New Recurring or Up-Sell	2

Monthly Total: 31, 36, 32

Quarterly Total: 99

Distribution Of Hours

	Client Tasks	Sales	Other
Q1 Goal	35%	35%	30%
Q1 Actual	20%	22%	58%
Q2 Goal	25%	25%	50%
Q2 Actual	29%	30%	41%
Q3 Goal	30%	25%	45%
Q3 Actual	31%	26.5%	42.3%
Q4 Goal	30%	25%	45%

Heather's Q3 Close Rates

Leads	Category	Source	Closed
My Sisters Closet	SEO	Sebo	
Slat Depot	SEO	Sebo	
All Guard Pest Control	SEO	Grant	
Doug Corrigan	SEO	Bruce	
CadPro	PPC	Jonny	
Thirst Drinks	PPC	Chris	X
LifetimeVibe	PPC	BNI	X
Revive Massage	GA	BNI	
7K Metals Group	GA	Sebo	
Pixingo	?	BNI	
Boil Restoration	?	BNI	
Escape Room Brigham City	?	BNI	
Screen Repair	?	BNI	

SEO Close Rate	0%
PPC Close Rate	66%
Total Close Rate	15%

2019 Q4 Action Items

- Networking

- Credibility phase in BNI Chapter
- Promote free SEO/PPC/Website Audits
- BNI - SpeedNet - Connect Utah - LinkedIn Lunch/TOTM - Women in Tech?

- Sales

- CRM Focus: Accountability & Identify Problem Areas
- “Wouldn’t it be cool if”... Sales Shadowing?

- Obstacles

- TBD... My hope is to find this out (Sales related? Skill related? Inefficient networking?)
- “I just can’t wait to be an MC”



End

