

Heather's 2020 Plan



Client Review

Client Review Q4

Recurring Clients: 9

• AE International	\$1,350
• Clegg Auto	-TDB-
• LifetimeVibe	\$700
• Computune	\$700
• Pony Express Dental	\$400
• Rhino Foundation Systems	-TBD-
• Solution Services	\$700
• Software Technology Group	\$1950
• Thirst Drinks	\$250

Extra Work Clients:

• Marketing Personalities	\$100
• James Mason Center For Recovery	\$300
• School For Good Living	\$500
• Zion Vista Homes	\$300
• Treasure Corporate Travel	\$300

Total Q4 Collected Revenue: \$26,100

Collected Revenue Breakdown (2019)

2019 Q1

- Jan
- Feb
- Mar

Recurring

\$1,350
\$3,300
\$3,300

Extra

\$1,900
\$500
\$100

Q1: \$10,450

Q2: \$11,047

Q3: \$18,335

Q4: \$26,100

2019 Q2

- Apr
- May
- Jun

\$3,300
\$3,300
\$3,300

\$647
\$0
\$500

2019 Q3

- Jul
- Aug
- Sep

\$3,300
\$4,695
\$4,250

\$700
\$0
\$0

2019 Q4

- Oct
- Nov
- Dec

\$4,250
\$4,550
\$5,350

\$0
\$300
\$1,200

2019: \$65,932

Revenue Projections 2020

2019 Q1

- Jan
- Feb
- Mar

Recurring

\$6,950
\$8,150
\$8,150

Extra

\$300
\$300
\$300

Total

\$7250
\$8450
\$8450

2019 Q2

- Apr
- May
- Jun

\$8,150
\$8,150
\$8,800

\$300
\$300
\$300

\$8450
\$8450
\$9100

Q1: \$24,150

Q2: \$26,000

Q3: \$27,950

Q4: \$29,900

2019 Q3

- Jul
- Aug
- Sep

\$8,800
\$8,800
\$9,450

\$300
\$300
\$300

\$9100
\$9100
\$9750

2019 Q4

- Oct
- Nov
- Dec

\$9,450
\$9,450
\$10,100

\$300
\$300
\$300

\$9750
\$9750
\$10,400

2020: \$108,000

Sales Points Plan

Monthly Sales Points Plan - TBD

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

2020 Q1 Action Items

- Full MC Skill Set
 - Task Delegation:
 - Description balance (When to have long descriptions vs. short)
 - What tasks to delegate
 - Bridge the knowledge gap
- Sales
 - Networking
 - Utah Leading Ladies? Women in Sales? BNI? Speed Net? LinkedIn Lunch?
 - Better tracking of leads
 - [CRM](#)? Sale Points?
 - Identifying weaknesses in sales process and working with mentors to improve
 - Bruce
 - Grant



Distribution Of Hours

Client Tasks	Sales	Other
25%	35%	40%

THE END



Collected Revenue Review (2019)

2019 Q1

- Jan \$3,250
- Feb \$3,800
- Mar \$3,400

2019 Q2

- Apr \$1,997
- May \$5,250
- Jun \$3,800

2019 Q3

- Jul \$5,195
- Aug \$8,195
- Sep \$4,945

2019 Q4

- Oct \$7,750
- Nov \$4,550
- Dec \$13,800

Q1: \$10,450

Q2: \$11,047

Q3: \$18,335

Q4: \$26,100

2019: \$65,932

Client Goals 2019 (Package Breakdown)

Q1

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

- Silver: 1
- Bronze: 2

Q2

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

- Silver: 2
- Bronze: 3

Q3

- 1 Gold (\$3150)
- 1 Silver (\$2475)
- 1 Silver (\$2550)
- 1 Bronze (\$1350) x 2
- 1 Bronze (\$1025)
- 1 Bronze (\$700)

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

Q4

- 1 Gold (\$3150)
- 1 Silver (\$2475)
- 1 Silver (\$2550)
- 1 Bronze (\$1025)
- 1 Bronze (\$1350) x3
- 1 Bronze (\$700) x2
- 1 Bronze (\$350)

- Gold: 1
- Silver: 2
- Bronze: 7

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