



PLANS

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- A plan is a mechanism for achieving a goal. We make plans at all levels of our lives.
- Despite the effectiveness and efficiencies of plans, many people do not create written plans.

What are some of the reasons people do not plan?

No matter what type of plan, it needs to be specific. The more specific the plan, the better the productivity. We need to be specific with our plans.

One-Way and Two-Ways Plans



One-Way Plans

Tag-Ons



Nothing can stop me from providing my clients/ members with outstanding service.

Referrals

Two-Ways Plans

SAMPLE OF A TWO-WAYS PLAN

Plan That Needs Improvement		Good Plan	
Current Clients/Members	Prospects	Current Clients/Members	Prospects
1. Complete two FINAPs 2. Complete 2 tele-consulting calls per day 3. Use Tag-On	1. Call on three prospects from the \$100M annual wage Marketing list 2. Call on referrals from Trust.	1. Update two FINAPs per day from tickler file with the objective of up selling one product or service. Stimming Forner Capps Monty Eberrrson White, Tammi Conrad Yearns Peters, Mike Gleaner 2. Complete 2 tele-consulting calls per day (4:00 daily) with objective of up selling checking to these home equity clients. Mary Adams John Stephens Harry Reynolds Carmen Taylor Sara McDonald Jesse Pear Harold Simmons Jennifer Brown Manny Ramos Karen Handle 3. Use Tag-On for home equity with each transaction. "Have you heard about...?"	1. Call on three prospects from the \$100M annual wage Marketing list with the purpose of referring to investment specialist. (Tuesday at 3:00) Peter Schlemer Maria Bell Kristen Tobbins 2. Call on referrals Margaret Kerry Gerald Given (Both from Terri Marshall in Trust) Prepare scripting

Note the *who, what, when*



What are the benefits of a Two-Ways Plan to:

Client/Member? _____

Sales Professional? _____

Bank/Credit Union? _____

Management Action Plans

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____



Batch Processing

What are those sales and operational functions that you can do at one time that will allow you to more effectively manage your plans?

