

# THE 5 Ms OF A BUSINESS PLAN



These five points will help you get your business off to a fast start.

## 1 Money / Motivation

- What is your money/income goal per month? \_\_\_\_\_
- Why are you building a business? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## 2 Manpower / Team

- Fast Start Challenge: 80/40/20/10 "Law of Numbers"
  - 80 Contacts in your warm market
  - Of those 80 contacts in the warm market, 40 could be ready to make a commitment to come to a BPM or BMP.
  - Of those 40 who attend a BPM or BMP, 20 could be ready to buy a product.
  - Lastly, 10 out of the 80 may be interested in joining WFG.
- How many people do you want and need to hit your monthly money goal per month? \_\_\_\_\_
- How many contacts per day do you need to hit your goals? \_\_\_\_\_

## 3 Market

- Millions of baby boomers
- Transfer of wealth
- Baby Boomers' Children, Generation X
- Relationship marketing
- Which one do you want to start with? \_\_\_\_\_
- Who do you know? (Top 25 list) \_\_\_\_\_

## 4 Management/Field Training

- You are in business for yourself, not by yourself.
- Your mentor/field trainer is \_\_\_\_\_ phone # \_\_\_\_\_
- Your SMD is \_\_\_\_\_ phone # \_\_\_\_\_

## 5 Methods/Marketing Tools

- WFG System Manual – to build and manage your business.
- MyWFG.com – track your team
- Marketing Tools

Note: There are many other marketing brochures and tools available on MyWFG.com. Speak to your Senior Marketing Director to find out which are best for you.



## BUSINESS PLAN WORKSHEET

\_\_\_\_\_  
Current Level

\_\_\_\_\_  
Next Promotion Level

\_\_\_\_\_  
Current Production

\_\_\_\_\_  
Promotion Requirements

Goals for the number of new Associates \_\_\_\_\_, sales \_\_\_\_\_, points \_\_\_\_\_, income \_\_\_\_\_  
each month.

Time/Resources you are willing to commit:

\_\_\_\_\_ Number of evenings/hours per week

\_\_\_\_\_ Number of BPM invitations per week

\_\_\_\_\_ Number of BPM/BMP guests per week

\_\_\_\_\_ Number of Follow-Up Interviews per week

\_\_\_\_\_ Number of new Associates per week

\_\_\_\_\_ Number of WFG Financial Strategy\* presentations per week

\_\_\_\_\_ Number of new clients per week

Deadline to achieve your goals: \_\_\_\_\_

\* A WFG Financial Strategy is a customized suitability and needs analysis developed by World Financial Group. The analysis is based upon information obtained from sources believed to be reliable and accurate.



# WEEKLY ACCOUNTABILITY SHEET



NAME:					MONTH				WK 1
ACTIVITY	MON	TUE	WED	THU	FRI	SAT	SUN	GOAL	RESULT
Read Business Plan									
# New Prospects									
Invitations									
Confirmations									
Guests to Corp Overview									
One-On-One (BMP)/ BPM Invite									
Phone Calls 10+									
Recruits Personal									
Recruits Team									
Financial Needs Analysis*									
Recommends									
Personal Points ('000)									
Team Points ('000)									
# of Referrals/Clients									
Families helped?									
Appts. next week									
Report to Leader?									
Income									
Savings									
Exercise									
Family Time									
Spiritual									
Plan Tomorrow (1hr)									
Read (1hr)									

\* The WFG Financial Needs Analysis is a suitability and needs analysis developed by World Financial Group. The analysis is based upon information obtained from sources believed to be reliable and accurate.

# TOP 10 REASONS

*For any Business Plan to grow wings and fly you must engage your most intense positive emotions. Here is one way this can be done:*

1. My love for \_\_\_\_\_ and our children creates a desire to provide real security, a life free from fear and worry about material concerns. I want independence for her and Iso we can spend our time and energy in, our relationship and family.
2. It is exciting to work within a situation that encourages emotional growth day by day. It requires me to become a better person.
3. I can be somebody, have a feeling of self worth, and know I can make a difference for others with my life.
4. I want to be a part of an enterprise, effort and career that I can love doing. I love the challenge and positive excitement! I want it to test me, to cause me to extend myself and to motivate me to become all that I can be.
5. I love to help and give to others as a way of life. I gain great value and happiness and a powerful feeling of well being by such effort.
6. It is great to associate with leadership I can follow with confidence in their character, and morality.
7. I can be in the people business and grow, in my understanding of human nature so as to apply that invaluable understanding, to motivate others to be good, to be somebody for wholesome reasons and purposes.
8. I have and maintain total financial independence, to have peace of mind, and to make decisions based on motives other than my own financial needs. I must use my resources to bless the lives of others.
9. We will make our home a place of safety and security. A place in the world to call our own and raise our children with happiness and love.
10. I can aspire, through this effort, to know I made a positive difference with my business life. That I kept balance and perspective as to what a good life really is.

## MY TOP 10 REASONS

1. My love for \_\_\_\_\_ (*spouse name*) creates a desire to provide real security, a life free from fear and worry about material concerns. I want independence for us so we can spend our time and energy in, our relationship and family.
2. It is exciting to work within a situation that encourages emotional growth day by day. It requires me to become a better person.
3. I can be somebody, have a feeling of self worth, and know I can make a difference for others with my life.
4. I want to be a part of an enterprise, effort and career that I can love doing. I love the challenge and positive excitement! I want it to test me, to cause me to extend myself and to motivate me to become all I can be.
5. I love to help and give to others as a way of life. I gain great value and happiness and a powerful feeling of well being by such effort.
6. It is great to associate with leadership I can follow with confidence in their character, and morality.
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## MY PERSONAL DAILY AFFIRMATION

I am, and must constantly strive to be, a Great Loving \_\_\_\_\_ (*husband & father / wife & mother*).

A loving, warm, tender, happy home life with my family is the way to experience heaven on earth. I will find deep happiness and peace through my service to my family. My commitment and focus is constant, and eternal in perspective.

I will be positive and with humor look on the bright side of how wonderful our life together is and will always be. We will work together to have patience, self-respect, respect for each other, trust, harmony and fun.

We will regularly count our blessings.

We will be unselfish and serve one another.

We will honor our parents.

I will be creative and thoughtful in my romance with \_\_\_\_\_ (*spouse name*). I have a Dream (*husband/wife*). We will share many wonderful times together as I focus my love on my her happiness. We will have weekly dates and regular exciting mini honeymoons.

I am a father to remarkable children, \_\_\_\_\_ (*your kids names*) who will know every day their father loves, respects, and believes in them. I will have a private loving one on one listening interview with each of them every week. I will set this appointment every Sunday for the week following.

My role as a \_\_\_\_\_ (*husband & father / wife & mother*) is my greatest joy and responsibility on this earth. I am happy as I commit all I have to their happiness. I am so blessed to be a husband and family man. My heart is full, and this blessing is truly wonderful.

I thank you my heavenly Father for all these blessings. Everything I do to make me a better man, I do it to honor You and because I love you.

## FINANCIAL AFFIRMATION

I Create Wealth, I am debt free and I continue to build financial strength.

I am wealthy, debt free and independent. I will continue to hold my conservative, service oriented, debt despising philosophy.

I am achieving all the following objectives by increasing my income and controlling my expenses. It feels fabulous to experience total financial independence.

From January to December I will put \_\_\_\_\_ per month to pay off my last remaining debt. I will never need or want to borrow again.

I will have \$ \_\_\_\_\_ in personal cash savings by December 20\_\_\_\_. I will save an average of \$ \_\_\_\_\_ per month.

I will have \$ \_\_\_\_\_,000 in liquid assets by December 31, 20\_\_\_\_

Tighten up and stay tight on personal and business expenses. Have a clear written line item budget for personal and business.

My career effort is in large part wasted without financial discipline.

I will update these objectives regularly.

I am a great steward and enjoy winning financially.

So help me God.

\_\_\_\_\_  
(*your name*)