



Create Your Fourth Quarter Planning Class 1 of 2

Welcome to the Fourth Quarter Planning Class!

My name is Eric Lofholm, and I will be your instructor for the next 2 sessions.

I have guided thousands of students through this planning process every year since 2003! I am excited to be here. I am committed to doing my part and providing you the training, encouragement, and inspiration for you to successfully complete your plan.

Your first golden nugget is clarity! The clearer you are the more likely you are to manifest a result.

Goal of this class: Create a 1-3+ page 4th quarter plan

The purpose of this class is for you to create a written plan for the 4th quarter for your business by 11:59 pm pacific on September 30.

Email me right now! Subject Line: I commit

Email Body: Hi Eric, I commit to completing my 4th quarter plan by September 30 at 11:59 pm pacific.

Here are the dates for classes.

- Wednesday, September 13 at 3 PM PT
- Thursday, September 14 at 3 PM PT

The recordings will be available at <http://hubpagereplay.com/>

The 4th Quarter Planning Class Series is open to the public. You can invite anyone.

Here's the link to register: <http://planningclass.com/>

Launching my new program this Friday at 9 am pacific

To register go to <https://ericlofholm.lpages.co/coach-with-eric-2023/>

Book your coaching session with Eric to review your plan – first 50 who are not already coaching with Eric - <https://ericlofholm.lpages.co/q4-coaching/>

If you have any questions, you can email customerservice@ericlofholm.com

Create your 4th Quarter Plan.

What we are going to do today, and Thursday is write out our business goals for the 4th quarter and create written plans on how we will achieve those goals.

Focus on completion versus perfection.

Ideas

Earn \$30,000

Take the year through thru the finish line

Be positive – have a great attitude

Give great effort daily

Reach out to 10 people per day

Get to bed by 10

More water less alcohol or no alcohol

Daily social media post

Let's begin by setting some overall goals of what you want to accomplish over the 4th quarter.

Ideas to consider:

- Gross sales goal
- Income goal
- New client goal
- Recruiting goal
- Social media follower's goal

You have 4 minutes to create goals. Go!

Now we are going to create monthly goals. Think about what you want your monthly goals to be over the next 3 months.

Consider:

- Monthly gross sales goal
- Monthly income goal
- Monthly new client goal
- Monthly recruiting goal
- Monthly social media follower's goal

You have 4 minutes to create some monthly goals. Go!

Create a Theme for the 4th Quarter!

- The Rest of 2023 is the Season of Consistency
- The Rest of 2023 is a Fresh Start
- The Rest of 2023 is a New Beginning
- Massive Action
- Leverage
- The Rest of 2023 is the Season of Massive Action
- The Breakout Quarter
- The Rest of 2023 is the Season of Duplication
- The Rest of 2023 is the Season of the Full Practice
- The Rest of 2023 is the Season of my Book being Published

You have 3 minutes to create your theme. Go!

Build association into your plan

- \$250,000 Idea
- Who do you want to JV with, partner with, hire, train with?

You have 3 minutes to identify 2 people you would like to associate with at a higher level.

Sales Math

- What is your income goal?
- What is your quarterly revenue goal?
- How many calls does it take to book an appointment?
- How many appointments does it take to make a sale?
- How much do you make per sale?
- 20 calls to book an appointment.
- 1 sale for every 3 appointments
- \$5,000 per sale
- \$25,000 income goal
- So we need:
- 5 sales or about 3 per month

Write down how many sales do you need to make to achieve your income or sales goal.

You have 4 minutes. Go!

Focus on Revenue Producing Activities

You have 3 minutes to identify 3 revenue producing activities. Go!