

KNOW YOUR TARGET MARKET

What are your business interests?

Profit, Growth focused, Active involvement, not passive

What do you have in common?

Active in the business. 20 employees. Service focus. 25+ years of experience.

What communities are you active in?

Chamber of Commerce, Advocis, CALU, IFB, CGIB, Muskoka Ski Club, St. Andrew's College Parents Guild, Huntsville Hospital Foundation, Alpine Ontario

What type of businesses do you want to work with?

Profitable, Owner active in business, Growth oriented business, Innovative, Passionate about what they do, Focused, Enjoy life

What type of businesses do you not want to work with?

Public companies, Foreign ownership, Outside southern Ontario, Decision makers that don't value advice from professionals, Short term outlook

What are your geographic restrictions?

Southern & Central Ontario

What employee size do you want to work with?

1 to 100 employees

KNOW YOUR TARGET MARKET

Taking the information from the previous "Thinking" page:

What is your target market?

Profitable, entrepreneurial businesses where the owner(s) is active and focused on growth, with between 1 and 100 full time employees, located in Southern and Central Ontario.

KNOW WHAT YOU ARE GOING TO SAY

Who would you like to help?

Successful growth oriented business owners.

What do you want to help them with?

Customized benefit plan design, implementation, and ongoing service.

How can you add value?

Targeted plan design for their unique business, conservative budgeting, tax effective solutions for the business owner, providing a clear understanding of the link between plan design and costs.

When do you want to help them?

Today, tomorrow, and beyond.

KNOW WHAT YOU ARE GOING TO SAY

Taking the information from the previous “Thinking” page, how do you answer the following question in one simple statement:

What do you do?

We help successful business owners build a better benefits plan than they can get anywhere else.

HOW MANY MEETINGS DO YOU NEED TO HAVE TO REACH YOUR GOAL

3 year annual revenue goal \$: 300,000

1 year annual revenue goal \$: 100,000

Assume annual employee benefits spend is 3,000 per year and average commission is 5%.

Each employee creates \$150.00 per year of revenue.

How many groups do you have to sell to meet your year 1 annual revenue goal?

$\$100,000 / 150 = 666$ full time employees

Average group size is 30 employees

Therefore: 22 new groups to reach my \$100,000 goal

Example: Revenue goal $\$75,000 / 150 = 500$ lives

Avg. size target market is 25

\therefore Need to sell 20 groups

HOW MANY MEETINGS DO YOU NEED TO HAVE TO REACH YOUR GOAL

What is the number of groups I need to sell?

22

How many meetings do I need to have?
(20% closing ratio → 100 meetings)

220

How many weeks per year do I want to work?

40

How many meetings do I have to have per week?

6

How many calls do I have to make per week?
(10% closing rate per call)

60

How many calls per working day do I have to make?

12

HOW MANY MEETINGS DO YOU NEED TO HAVE TO REACH YOUR GOAL

My target market is?

Profitable, entrepreneurial businesses where the owner(s) is active and focused on growth, with between 1 and 100 full time employees, located in Southern and Central Ontario.

What I do is?

We help successful business owners build a better benefits plan than they can get anywhere else.

How many calls per day do I need to make to reach my financial goals?

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