

Itinerary



Elite Leads Business Development Itinerary

11.1

ITINERARY

Follow the itinerary very closely. I know things will get in your way, but, the closer you follow it, the faster you will see the groups grow. Don't allow family and friends the luxury of interrupting you, just because you work in a home office. Be adamant about you are working.

Before I designed this program, I would always forget one or two important details for running the meetings. It was extremely frustrating.

First Month:

TIME	HOURS	TASK	# OF CALLS
------	-------	------	------------

MONDAY:

8am		Establish a mailing address other than your residence. You do not want members or guests showing up at your doorstep.	
-----	--	---	--

File a fictitious business license
Look up the location of your County's Clerk's office. You will need to file your "Doing Business As" (dba) at this office. The cost is generally \$25. You will receive several copies of the form for each of the following requirements.

Submit your business license for publication
The county clerk will give you a list of publications that are approved for publishing your business license. In most areas, it must be published five times. The cost is generally less than \$50.00. Hand carry your dba to their office to eliminate the possibility of missing the publication.

File for a city business license
Look up the location of your City's Business office. Often they are located in the same building as the police department. Use your mailing address, as a lot of communities do not allow homebased businesses in certain residential areas.

11:00	.5	Visit the Chamber of Commerce closest to you Ask for a directory of the members. You do not need to join the chamber at this point, but do indicate that you are interested in joining. Find out if they have leads groups, and when they are. Usually they're at 7:30 am and will not be in conflict with our times.	
-------	----	--	--

"The majority of men meet with failure because of their lack of persistence in creating new plans to take the place of those which fail."

- Napoleon Hill

Elite Leads Business Development Itinerary

11.2

We'll talk further about the trades that we do in exchange for joining each chamber after we've established six groups or if they have a trade show scheduled within six months.

TIME	HOURS	TASK#	OF CALLS
MONDAY:			
1:00	3	Marketing	60

You should have at least a couple of hours left to try your hand at the telemarketing. The directory from the chamber is one of the greatest returns on calls.

Over the years I have hired dozens of telemarketers and the ratios are always the same. In the worst case scenario, they average out:

20 calls per hour = 10 people interested = 5 who show up and 2 who join.

110 hours your first month will provide about 50 members the first month's meetings and another 50-60 from the same calls the next 30 days.

When you meet prospects at chamber mixers however, the ratio is 1 in 5. The over all average is 1 in 8 during the 7 years I have tracked all the calls.

Refer to Chapter 3, page 3 for more details. By now, you should have the benefits committed to memory.

The conversation should be kept simple:

"I'm calling to invite you as my (or referrals name) guest to our Business Development Group"

"I see that you're a member of the chamber and I'd like to invite you to attend our new leads group."

Do not infer that it is part of the chamber, if you have to explain, mention that you stopped by the chamber and are considering membership.

Use the auto dial feature on your computer to increase your efficiency. Refer to 3.5 for the details on entering the information in the database.

"Great spirits have always encountered violent opposition from mediocre minds.."
-Albert Einstein

The responses will be: "I'm too busy" in which you could respond "I know what you mean, it's hard to get everything done that needs to get done, especially as an entrepreneur. What our members have found is that once they get leads from our groups and start building strategic alliances, they end up doing more profitable business in less time and eliminate the majority of their time management issues."

or, "I tried a group before and it didn't work." and your response "Are all _____ (what ever they do) alike? Elite Leads was created because of all the things the founder didn't like about other groups. I will take one hour to explore and most of our members find they don't have to do any other marketing once they've been in Elite for a year."

or, "What's or leads group?" your response: "Imagine sitting at a table with 15 entrepreneurs and they're all willing to introduce you to their clients and contacts so you can do business with them! It's like having 15 sales people working for you."

"I've been looking for a leads groups." your response: "Great, we have a meeting coming up next week."

Be sure to included:

1. Basic description of the meeting: "We keep you informed about events and organizations that you can get leads from."
2. One or two members will do a presentation about their business.
3. Before we exchange leads, we request Power Partner introductions. These are potential relationships with industry specific individuals that are already doing business with someone you would like to do business with, but for a different purpose."
4. Then we exchange leads. Typically we exchange 30-60 leads at each meeting. Even though our policies encourage bringing a leads to every meeting, we do not have a mandatory lead exchange. So when you get a lead, you know it's qualified or it's because they truly want to help you.
5. We have an exclusivity policy, so to save your position, most of our guests join at the end of the meeting. We accept checks and major credit cards.

"One of the greatest discoveries a man makes, one of his great surprises, is to find he can do what he was afraid he couldn't do."

- Henry Ford

Elite Leads Business Development Itinerary

11.4

When I get stone-walled I have no difficulty responding to a definite "No!" with "I can understand if you have all the business you can do and it generates more than enough income why you would say no, but most of our members have found that being referred to other members' clients has brought them more business that didn't require the intensity of time and gave them more profitable clients."

Another response for "I'm not interested!" "Do you know what you're not interested in? A leads organization is generally 50% more effective in return of time and investment that any other marketing resource."

"50% of our members renew every six months, they wouldn't renew unless they believed the investment was worth while."

"Our meetings are once a month so we don't monopolize your time. Our members are very professional and do not need to see each other every week, they know to call if something comes up between meetings."

"We have the only business-to-business leads organization. We are looking for a _____ (their industry) to give the leads we get from the (mention Power Partners, like telecommunications, movers, commercial leasing, etc.) members."

"We meet in conference rooms, not in restaurants around food and the noise. We really are getting together just to create more business."

Price is an issue: "We understand that \$250 seems like a lot, but what else can you do for \$40 a month that will give you personal introductions to potential clients."

Appeal to their desire for success: "Nine out of ten businesses fail during the first five years. There have been more than 1,500 members of Elite Leads since 1990 and 90% are still in business. That's the opposite of the national average."

"A sense of the value of time - that is, of the best way to divide one's time into one's various activities - is an essential preliminary to efficient work; it is the only method of avoiding hurry."

- George Bernard Shaw

Elite Leads Business Development Itinerary

11.5

Meeting Facility

You probably know of a number of realtors. Call and ask who they would refer for a title company contact. Call their contact and say "[Realtor's name] gave me you name because we have a new business development leads meeting starting in about a month. We need a conference room that will seat about 15 people, would you like to exchange membership for the facility use one day a month from 8:30 to 1:30?"

Often chamber let members use their conference room at no charge. It would be worth joining if you can get away with a four to five hour block of time.

Other resources are hotels, community rooms, realtors, bankers, stock investment firms and for a better resource, refer to your business section where other meetings are listed. Where other's meet is sometimes the best resource.

Acquire a Business Phone Line

You do not want people having access to your home phone. They will, for any reason feel free to call you at 6 in the morning, midnight and on weekends. It is important to protect your privacy. It is also required to place your business ad in the phone book. Refer to 3.9 for more details.

Place your ad in the Yellow Pages

Request that your listing be under the heading of "Business Development". We do NOT want to create a category for "Leads Groups" because it will draw attention to the other groups.

Acquire a DSL or cable hookup

You won't want to deal with a dial-up because of the slow response and your data entry will be driven through the website. Refer to the Excel file "formE1-Checklist" for the details and options.

TUESDAY:

8am

Set up an email account

Your email address is yourname@eliteleads.com, however, it will be forwarded to your personal email account.

"One of the greatest discoveries a man makes, one of his great surprises, is to find he can do what he was afraid he couldn't do."

- Henry Ford

Elite Leads Business Development Itinerary

invitation sending account. Refer to 5.1 for instructions on how to use the email.

Set up an efax account

Log on to <http://efax.com> and establish a free fax receiving account. This is the local fax number you will give out. The faxes will be sent to you as email. I have found that it is much easier to decide if I should print faxes rather than have them all come in to my stationary fax. I use that one to send material that is not in my computer.

Open Your Business Checking Account

One of the copies of your dba is to allow you to open your business checking account. You must take two forms of identification with you to open the account. Look for a small community bank and talk with the business banking officer. Be sure to invite them to your Elite Leads meeting.

*"Time is the coin of your life.
It is the only coin you have,
and only you can determine
how it will be spent. Be
careful lest you let other
people spend it for you."
- Carl Sandburg*

TIME	HOURS	TASK	# OF CALLS
1:00	3	Marketing	60

4:00 Apply for a Merchant account
There are several choices, but I believe the Costco merchant account is the best.

Click Bank	http://www.clickbank.com/
SSL Security	888 821-4576
American Home Business	homebusiness.com or 800 664-2422 x D330
AIS Merchant	aismedia.com
CostCo	800 220-6000 www.costco.com

5:00 Print Phone Logs
Refer to 3.7 "form21-PhonePages.doc" for instructions

5:15 Print Phone Pages
Refer to 3.8 "

TIME	HOURS	TASK	# OF CALLS
------	-------	------	------------

WEDNESDAY:

9:00	3	Return Calls Refer to 3.6 for complete instructions on how to use the phone log most efficiently.	
------	---	--	--

Contact the Business Journal or Times
Refer to 3.9 to find the closest available journal to you and how you should approach them.

Elite Leads Business Development Itinerary

Send Press Releases

Call the local newspapers, rag sheets like Penny Savers, Time Out sections, business trade publications and obviously include the Business Journal. I have eight separate publications that print my meeting information for free. Refer to 3.10 for instructions.

1:00 3 Marketing 60

4:00 Return Calls

5:00 Send Press Information on You
Send a black-and-white photo and brief announcement to People on the Move or People in Motion: "Walnut Creek, CA-based Elite Leads Business Development is proud to announce their expansion in London, Canada. John Clark, 35-year resident of the community is the owner of the international firm that promotes business development for entrepreneurs and sales consultants.

"Resolve in advance to persist until you succeed, no matter what the difficulty."

- Brian Tracy

TIME	HOURS	TASK	# OF CALLS
------	-------	------	------------

THURSDAY:

8am	3	Chamber Mixers Every month most chambers hold member and guest mixers. This is a great opportunity to find out who is the most active business people in the community. Call each chamber to find out when and where their events are going to be. Plan on attending at least one each week as the meet-to-join return ration is about 50%. This is your best return. Try to get a directory.	
-----	---	--	--

9am	3	Marketing	60
-----	---	-----------	----

1:00	3	Marketing	60
------	---	-----------	----

4:00 Return Calls

5:00 Attend a Mixer
This will be the highest return on your time. I often will obtain 5 members from one event. The goal is to meet 20 new people at each event. Try not to spend more than 5 minutes with each person.

You might even want to print the "Guest Pass" (form15-guestpass.p65) in color, to hand out.

Elite Leads Business Development Itinerary

Refer to the website: <http://www.eliteleads.com/nettips.htm> for more ideas on how to make the event productive and fun.

TIME	HOURS	TASK	# OF CALLS
FRIDAY:			
8am		<p>Bio & Picture</p> <p>Write a brief bio that will be placed on the website with your contact information. It should include your professional background, personal family information like whether you're married, how many children and grandchildren you have, and how long you've lived in the area. Include anything you would want guests and members to know about you, what your aspirations are for your Elite Leads business and other insights that you believe are relevant. I will edit the copy. Email it to sharyn@eliteleads.com along with a color headshot in a .pdf file format.</p>	
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
5:00		<p>Get office supplies</p> <p>You will need to order</p> <p>6 Duo-Tang Teal Heavy Duty High Gloss Pocket Folders 10/pkg #59425-61 10BG</p> <p>4 Rolodex Mobile Business Card Binder Kits 15/pkg #67696</p> <p>2 reams 8 1/2 x 11 bond</p> <p>3 plastic pocket folders</p> <p>Send Attendance Forms</p> <p>Make a copy of the attendance forms from your meetings this week and send them to the corporate office.</p> <p>While you're at it, make sure that your meeting materials, Agenda, Fee Reports and Attendance are all filed in their proper lead group binder. This will help you keep things organized as you go along.</p> <p>Search for Library Material</p> <p>Look through your library to see what you have that might be relevant for lending. Other sources include</p>	

"The last of the human freedoms is to choose one's attitudes."

-Victor Frankl

Elite Leads Business Development Itinerary

friends, the library might have books for sale, second-hand stores, etc.

Email in Excel the list of material that you have to start with at least one week prior to your first meeting.

The fields should be: Title, Author (full name), Last (last name for sorting), Book, Cassette, Video. Refer to the website <http://www.eliteleads.com/library1.htm> for possible categories if you have questions. The general categories are: "Business Development", "Personal Development" "Inspirational", "Biography", "Sales Skills", and "Marketing or PR".

Please be sure to stay with those specific categories.

Send the material in an attached file by the last week of each month to make sure it gets included on the website updates.

*"The great dividing line
between success and failure
can be expressed in five
words: 'I did not have time.'"
- Anthony J. d'Angelo*

TIME	HOURS	TASK	# OF CALLS
------	-------	------	------------

WEEK 2 MONDAY:

8am		Prepare Marketing Materials for the week	
9:00	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

TIME	HOURS	TASK	# OF CALLS
------	-------	------	------------

TUESDAY:

9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

TIME	HOURS	TASK	# OF CALLS
------	-------	------	------------

WEDNESDAY:

9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

Elite Leads Business Development Itinerary

11.10

TIME	HOURS	TASK	# OF CALLS
THURSDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
5:00		Attend a Mixer	

TIME	HOURS	TASK	# OF CALLS
FRIDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
		Search for Library Material	

*"Without a sense of caring,
there can be no sense of
community."*
- Anthony J. d'Angelo

TIME	HOURS	TASK	# OF CALLS
WEEK 3 MONDAY:			
8am		Prepare Marketing Materials for the week	
9:00	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

TIME	HOURS	TASK	# OF CALLS
TUESDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

TIME	HOURS	TASK	# OF CALLS
WEDNESDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

Elite Leads Business Development Itinerary

11.11

TIME	HOURS	TASK	# OF CALLS
THURSDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
5:00		Attend a Mixer	
FRIDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
		Search for Library Material	
WEEK 4 MONDAY:			
8am		Prepare Marketing Materials for the week	
9:00	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
5:00		Send Email for Groups 1, 2 & 3 Refer to 5.1	
TUESDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
WEDNESDAY:			
9:00	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

"This one step -- choosing a goal and sticking to it -- changes everything."
- Scott Reed

Elite Leads Business Development Itinerary

11.12

TIME	HOURS	TASK	# OF CALLS
THURSDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
5:00		Attend a Mixer	

TIME	HOURS	TASK	# OF CALLS
FRIDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
		Search for Library Material	
4:00		Return Calls	
		Search for Library Material	

*"Without a sense of caring,
there can be no sense of
community."*
- Anthony j. d'Angelo

TIME	HOURS	TASK	# OF CALLS
WEEK 3 MONDAY:			
8am		Prepare Marketing Materials for the week	
9:00	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

TIME	HOURS	TASK	# OF CALLS
TUESDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

TIME	HOURS	TASK	# OF CALLS
WEDNESDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

Elite Leads Business Development Itinerary

11.13

TIME	HOURS	TASK	# OF CALLS
THURSDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
5:00		Attend a Mixer	

TIME	HOURS	TASK	# OF CALLS
FRIDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
		Search for Library Material	

"This one step -- choosing a goal and sticking to it -- changes everything."
- Scott Reed

TIME	HOURS	TASK	# OF CALLS
WEEK 4 MONDAY:			
8am		Prepare Marketing Materials for the week	
9:00	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
5:00		Send email for Groups 1, 2 & 3 Refer to 5.1	

TIME	HOURS	TASK	# OF CALLS
TUESDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

TIME	HOURS	TASK	# OF CALLS
WEDNESDAY:			
9:00	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	

Elite Leads Business Development Itinerary

11.14

TIME	HOURS	TASK	# OF CALLS
THURSDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
5:00		Attend a Mixer	
TIME	HOURS	TASK	# OF CALLS
FRIDAY:			
9am	3	Marketing	60
1:00	3	Marketing	60
4:00		Return Calls	
		Search for Library Material	

"Ask for what you want , but
be willing to take what God
gives you. It may be better
than what you asked for."
- Norman Vincent Peale

Second Month:
Please follow the Itinerary from 11.2 and refer to 11.16 for
the tasks that change during your second month and each
month thereafter.

Elite Leads Business Development Itinerary

11.15

Time Management Worksheet-Month 1

Week	Monday	Tuesday	Wednesday	Thursday	Friday
1.	8 <i>Bus Mailing Address</i>	<i>Set up email account</i>	<i>Return Calls</i>	<i>Chamber Mixers</i>	<i>Bio & Picture (pdf)</i>
	9 <i>File Fictitious License</i>	<i>Set up email account</i>	<i>Contact business</i>	<i>Marketing</i>	<i>Marketing</i>
	10 <i>Submit DBA for Pub</i>	<i>Set up efax account</i>	<i>journal Newspaper</i>	<i>Marketing</i>	<i>Marketing</i>
	11 <i>File City Bus Lic</i>	<i>Open Bus Checking</i>	<i>Press infomation</i>	<i>Marketing</i>	<i>Marketing</i>
	12 <i>Visit Chamber</i>		<i>for meeting</i>		
	1 <i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
	2 <i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
	3 <i>Meeting Facility</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
	4 <i>Acquire 2nd Phone</i>	<i>Apply for Merchant</i>	<i>Return Calls</i>	<i>Return Calls</i>	<i>Return Calls</i>
	5 <i>Place ad/Phone Book</i>	<i>Phone Logs</i>	<i>Press info/on you</i>	<i>Office Suppies</i>	
	6 <i>Acquire Internet Access</i>	<i>Phone books</i>		<i>Attend Mixer</i>	<i>Search Library Mat</i>
	2.	8 <i>Prepare Marketing Material for the week</i>			
9 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
10 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
11 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
12					
1 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
2 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
3 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Mail copies of Attend</i>
4 <i>Return Calls</i>		<i>Return Calls</i>	<i>Return Calls</i>	<i>Return Calls</i>	<i>Return Calls</i>
5					<i>Search Library Mat</i>
6				<i>Attend Mixer</i>	
3.		8 <i>Prepare Marketing Material for the week</i>			
	9 <i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
	10 <i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
	11 <i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
	12				
	1 <i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
	2 <i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
	3 <i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Chamber Mixers</i>
	4 <i>Return Calls</i>	<i>Return Calls</i>	<i>Return Calls</i>	<i>Return Calls</i>	<i>Return Calls</i>
	5				<i>Search Library Mat</i>
	6			<i>Attend Mixer</i>	
	4:	8 <i>Prepare Marketing Material for the week</i>			
9 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
10 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
11 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
12					
1 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>
2 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Check Inventory</i>
3 <i>Marketing</i>		<i>Marketing</i>	<i>Marketing</i>	<i>Marketing</i>	<i>Month-end Reports</i>
4 <i>Return Calls</i>		<i>Return Calls</i>	<i>Return Calls</i>	<i>Return Calls</i>	<i>Return Calls</i>
5 <i>Send Email 1,2 & 3</i>				<i>Attend Mixer</i>	<i>Search Library Mat</i>

Note: Items in bold are action items that must be taken care of the first week.

Elite Leads Business Development Itinerary

11.16

Time Management Worksheet-Month 2

Week	Monday	Tuesday	Wednesday	Thursday	Friday	
1.	8	Clip News articles	Press infomation	Practice Introduction	Back-up Files	
	9	Guest Packets	Marketing	Marketing	Group 1	Follow-up on leads
	10	Website updates	Marketing	Marketing		Thank You's
	11	Check Inventory	Marketing	Marketing	Group 2	Absentee Calls
	12					
	1	Reminder Calls	Marketing	Marketing	Group 3	Marketing
	2	Groups 1, 2 & 3	Marketing	Marketing		Marketing
	3	Meeting Preparation	Call Backs	Marketing	Enter Accounting	Marketing
	4	Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
	5	Assemble Packets	Run Roster	Chamber Directories	Office Suppies	Send Attendance ELBD
	6	Phone Logs	Phone books	Send NL to Chambers	Attend Mixer	Search Library Mat
	2.	8	Prepare Marketing Material for the week			Quality Control
9		Marketing	Marketing	Marketing	Marketing	Marketing
10		Marketing	Marketing	Marketing	Marketing	Marketing
11		Marketing	Marketing	Marketing	Marketing	Marketing
12						
1		Marketing	Marketing	Marketing	Marketing	Marketing
2		Marketing	Marketing	Marketing	Marketing	Marketing
3		Marketing	Marketing	Marketing	Marketing	Marketing
4		Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
5						Search Library Mat
6					Attend Mixer	
3.		8	Prepare Marketing Material for the week			
	9	Marketing	Marketing	Marketing	Marketing	Marketing
	10	Marketing	Marketing	Marketing	Marketing	Marketing
	11	Marketing	Marketing	Marketing	Marketing	Marketing
	12					
	1	Marketing	Marketing	Marketing	Marketing	Marketing
	2	Marketing	Marketing	Marketing	Marketing	Website updates
	3	Marketing	Marketing	Marketing	Marketing	Chamber Mixers
	4	Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
	5					Search Library Mat
	6				Attend Mixer	
	4.	8	Prepare Marketing Material for the week			
9		Marketing	Marketing	Marketing	Marketing	Marketing
10		Marketing	Marketing	Marketing	Marketing	Marketing
11		Marketing	Marketing	Marketing	Marketing	Marketing
12						
1		Marketing	Marketing	Marketing	Marketing	Marketing
2		Search A's & B's	Marketing	Marketing	Marketing	Check Inventory
3		Search A's & B's	Marketing	Marketing	Marketing	Month-end Reports
4		Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
5		Email 1,2, 3, 4, 5 & 6			Attend Mixer	Search Library Mat

Elite Leads Business Development Itinerary

11.17

Time Management Worksheet-Month 3

Week

1.	8	Clip News articles	Press information	Practice Introduction		Back-up Files
	9	Guest Packets	Marketing	Group 4	Group 1	Follow-up on leads
	10	Website updates	Marketing			Thank You's
	11	Check Inventory	Marketing	Group 5	Group 2	Absentee Calls
	12					
	1	Reminder Calls	Marketing	Group 6	Group 3	Marketing
	2	Groups 1,2,3,4,5,6	Marketing			Marketing
	3	Meeting Preparation	Call Backs	Enter Accounting	Enter Accounting	Credit Referrals
	4	Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
	5	Assemble Packets	Run Roster	Chamber Directories	Office Supplies	Send Attendance ELBD
	6	Phone Logs	Send NL to Chambers		Attend Mixer	Search Library Mat
	2.	8	Prepare Marketing Material for the week			
9		Workshops Started	Marketing	Marketing	Marketing	Marketing
10		Marketing	Marketing	Marketing	Marketing	Marketing
11		Marketing	Marketing	Marketing	Marketing	Marketing
12						
1		Marketing	Marketing	Marketing	Marketing	Marketing
2		Marketing	Marketing	Marketing	Marketing	Marketing
3		Marketing	Marketing	Marketing	Marketing	Marketing
4		Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
5						Search Library Mat
6					Attend Mixer	
3.		8	Prepare Marketing Material for the week			
	9	Marketing	Marketing	Marketing	Marketing	Marketing
	10	Marketing	Marketing	Marketing	Marketing	Marketing
	11	Marketing	Marketing	Marketing	Marketing	Marketing
	12					
	1	Marketing	Marketing	Marketing	Marketing	Marketing
	2	Marketing	Marketing	Marketing	Marketing	Website updates
	3	Marketing	Marketing	Marketing	Marketing	Chamber Mixers
	4	Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
	5					Search Library Mat
	6				Attend Mixer	
	4:	8	Prepare Marketing Material for the week			
9		Marketing	Marketing	Marketing	Marketing	Marketing
10		Marketing	Marketing	Marketing	Marketing	Marketing
11		Marketing	Marketing	Marketing	Marketing	Marketing
12						
1		Search C's & D's	Marketing	Marketing	Marketing	Marketing
2		Search C's & D's	Marketing	Marketing	Marketing	Marketing
3		Search C's & D's	Marketing	Marketing	Marketing	Check Inventory
4		Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
5		Email 1,2, 3, 4, 5 & 6			Attend Mixer	Search Library Mat

Elite Leads Business Development Itinerary

11.18

Time Management Worksheet-Month 4

Week	Monday	Tuesday	Wednesday	Thursday	Friday
1.	8	Clip News articles	Press infomation	Practice Introduction	Back-up Files
	9	Guest Packets	Marketing	Group 4	Group 1
	10	Website updates	Marketing		Follow-up on leads
	11	Check Inventory	Marketing	Group 5	Group 2
	12				Thank You's
	1	Reminder Calls	Marketing	Group 6	Group 3
	2	Groups 1,2,3,4,5,6	Marketing		Marketing
	3	Meeting Preparation	Call Backs	Enter Accounting	Enter Accounting
	4	Return Calls	Return Calls	Return Calls	Send email: 7, 8 & 9
	5	Assemble Packets	Run Roster	Chamber Directories	Office Suppries
	6	Phone Logs	Phone books	Send NL to Chambers	Attend Mixer
	2.	8	Clip News articles	Prepare Marketing Material for the week	
9		Reminder Calls	Marketing	Marketing	Group 7
10		Groups 7, 8 & 9	Marketing	Marketing	Follow-up on leads
11			Marketing	Marketing	Group 8
12					Thank You's
1		Marketing	Marketing	Marketing	Group 9
2		Marketing	Marketing	Marketing	Marketing
3		Meeting Preparation	Marketing	Marketing	Enter Accounting
4		Return Calls	Return Calls	Return Calls	Return Calls
5				Search Library Mat	Return Calls
6					Attend Mixer
3.		8	Prepare Marketing Material for the week		
	9	Marketing	Marketing	Marketing	Marketing
	10	Marketing	Marketing	Marketing	Marketing
	11	Marketing	Marketing	Marketing	Marketing
	12				Marketing
	1	Marketing	Marketing	Marketing	Marketing
	2	Marketing	Marketing	Marketing	Marketing
	3	Marketing	Marketing	Marketing	Marketing
	4	Return Calls	Return Calls	Return Calls	Return Calls
	5				Return Calls
	6				Search Library Mat
	4:	8	Prepare Marketing Material for the week		
9		Marketing	Marketing	Marketing	Marketing
10		Marketing	Marketing	Marketing	Marketing
11		Marketing	Marketing	Marketing	Marketing
12					Marketing
1		Search E's & F's	Marketing	Marketing	Marketing
2		Search E's & F's	Marketing	Marketing	Marketing
3		Search E's & F's's	Marketing	Marketing	Marketing
4		Return Calls	Return Calls	Return Calls	Return Calls
5		Email 1,2, 3, 4, 5 &6			Return Calls
6					Attend Mixer

Elite Leads Business Development Itinerary

11.19

Time Management Worksheet-Month 5

Week

1.	8	Clip News articles	Press information	Practice Introduction		Back-up Files
	9	Guest Packets	Marketing	Group 4	Group 1	Follow-up on leads
	10	Website updates	Marketing			Thank You's
	11	Check Inventory	Marketing	Group 5	Group 2	Absentee Calls
	12					
	1	Reminder Calls	Marketing	Group 6	Group 3	Marketing
	2	Groups 1,2,3,4,5,6	Marketing			Send Attendance ELBD
	3	Meeting Preparation	Call Backs	Enter Accounting	Enter Accounting	Check Library
	4	Return Calls	Return Calls	Return Calls	Send email: 7, 8 & 9	Return Calls
	5	Assemble Packets	Phone books	Run Roster	Chamber Directories	Office Supplies
	6	Phone Logs	Send NL to Chambers	Credit Referrals	Attend Mixer	Search Library Mat
	2.	8	Clip News articles	Prepare Marketing Material for the week		
9		Reminder Calls	Marketing	Marketing	Group 7	Follow-up on leads
10		Groups 7, 8 & 9	Marketing	Marketing		Thank You's
11			Marketing	Marketing	Group 8	Absentee Calls
12						
1		Marketing	Marketing	Marketing	Group 9	Marketing
2		Marketing	Marketing	Marketing		Marketing
3		Meeting Preparation	Marketing	Marketing	Enter Accounting	Credit Referrals
4		Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
5						Search Library Mat
6					Attend Mixer	Send Attendance ELBD
3.		8	Prepare Marketing Material for the week			
	9	Marketing	Marketing	Marketing	Marketing	Marketing
	10	Marketing	Marketing	Marketing	Marketing	Marketing
	11	Marketing	Marketing	Marketing	Marketing	Marketing
	12					
	1	Marketing	Marketing	Marketing	Marketing	Marketing
	2	Marketing	Marketing	Marketing	Marketing	Website updates
	3	Marketing	Marketing	Marketing	Marketing	Chamber Mixers
	4	Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
	5					Search Library Mat
	6				Attend Mixer	
	4:	8	Prepare Marketing Material for the week			
9		Marketing	Marketing	Marketing	Marketing	Marketing
10		Marketing	Marketing	Marketing	Marketing	Marketing
11		Marketing	Marketing	Marketing	Marketing	Marketing
12						
1		Search C's & D's	Marketing	Marketing	Marketing	Marketing
2		Search C's & D's	Marketing	Marketing	Marketing	Marketing
3		Search C's & D's	Marketing	Marketing	Marketing	Check Inventory
4		Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
5		Email 1,2, 3, 4, 5 & 6			Attend Mixer	Search Library Mat

Elite Leads Business Development Itinerary

11.20

Time Management Worksheet-Month 6

Week	Monday	Tuesday	Wednesday	Thursday	Friday	
1.	8	Clip News articles	Press information	Practice Introduction		Back-up Files
	9	Guest Packets	Marketing	Group 4	Group 1	Follow-up on leads
	10	Website updates	Marketing			Thank You's
	11	Check Inventory	Marketing	Group 5	Group 2	Absentee Calls
	12					
	1	Reminder Calls	Marketing	Group 6	Group 3	Marketing
	2	Groups 1,2,3,4,5,6	Marketing			Credit Referrals
	3	Meeting Preparation	Call Backs	Enter Accounting	Enter Accounting	Check Library
	4	Return Calls	Return Calls	Send email: 7, 8 & 9	Return Calls	Send Attendance ELBD
	5	Assemble Packets	Run Roster	Send email: 10,11&12	Chamber Directories	Office Supplies
	6	Phone Logs	Phone books	Send NL to Chambers	Attend Mixer	Search Library Mat
	2.	8	Clip News articles	Prepare Marketing Material for the week		
9		Reminder Calls	Marketing	Group 10	Group 7	Follow-up on leads
10		Groups 7, 8 & 9	Marketing			Thank You's
11			Marketing	Group 11	Group 8	Absentee Calls
12						
1		Marketing	Marketing	Group 12	Group 9	Marketing
2		Marketing	Marketing			Marketing
3		Meeting Preparation	Marketing	Enter Accounting	Enter Accounting	Credit Referrals
4		Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
5				Search Library Mat		Send Attendance ELBD
6					Attend Mixer	
3.		8	Prepare Marketing Material for the week			
	9	Marketing	Marketing	Marketing	Marketing	Marketing
	10	Marketing	Marketing	Marketing	Marketing	Marketing
	11	Marketing	Marketing	Marketing	Marketing	Marketing
	12					
	1	Marketing	Marketing	Marketing	Marketing	Marketing
	2	Marketing	Marketing	Marketing	Marketing	Website updates
	3	Marketing	Marketing	Marketing	Marketing	Chamber Mixers
	4	Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
	5					Search Library Mat
	6				Attend Mixer	
	4:	8	Prepare Marketing Material for the week			
9		Marketing	Marketing	Marketing	Marketing	Marketing
10		Marketing	Marketing	Marketing	Marketing	Marketing
11		Marketing	Marketing	Marketing	Marketing	Marketing
12						
1		Search E's & F's	Marketing	Marketing	Marketing	Marketing
2		Search E's & F's	Marketing	Marketing	Marketing	Marketing
3		Search E's & F's's	Marketing	Marketing	Marketing	Check Inventory
4		Return Calls	Return Calls	Return Calls	Return Calls	Return Calls
5		Email 1,2, 3, 4, 5 &6			Attend Mixer	Search Library Mat