**Revenue Stacker Framework**

The Revenue Stacker is built to help you stack revenue fast — by filling your pipeline with new opportunities over the next 90 days.

There are plenty of ways to grow your book — content, networking, referrals — but if you want *immediate* movement, this is the most direct path.

The Revenue Stacker focuses on cold outreach, specifically cold calling, because it’s the fastest and most efficient way to generate new business.  
 Commercial insurance buyers are used to getting calls every week, which gives you a huge advantage. When you use this strategy, you immediately stand out, differentiate yourself, and open real conversations.

This system will help you:

* Build and maintain a 90-day pipeline of fresh opportunities
* Expand your prospect list weekly so there’s always new activity
* Use simple, proven call scripts that position you as a trusted advisor
* Stack consistent revenue, month after month

## **Step 1 | Identify Target Prospects**

The goal of the Revenue Stacker is to fill your pipeline fast—so this list will be broader and more active than your long-term niche list.

You’re not trying to build a perfect niche book right now. You’re trying to find businesses that are ready to move—people in pain, people with renewals coming due, people already shopping on price.

### **Who You’re Looking For**

* Accounts that renew within the next 90 days
* Accounts that meet your minimum revenue threshold
* Industries that are easy to reach and responsive (trucking, contracting, construction, small manufacturing, etc.)
* Buyers who are price-sensitive and open to hearing a new strategy

The mindset:  
 If they’re willing to run the BOR strategy, they’re your people—regardless of industry.  
 Your *real* niche right now is the BOR.

### **Building the List**

Use any X-date or prospecting source you have access to:

* InsuranceXDates.com
* MiEdge by Zywave
* MeetLeo
* LexisNexis

**How to Organize It**

* Sort all prospects by X-date and premium size
* Save by month—either in the software or a simple Excel tracker
  + Tab 1 = October
  + Tab 2 = November
  + Tab 3 = December
  + Tab 4 = January

Always keep four active months in your calling rotation:

*Current month + next three months.*

Example:  
 If it’s October, you’re calling October–January.  
 As mid-October hits, drop October and add February—so the cycle keeps rolling forward.

This keeps you 90 days ahead, always calling into active markets, and ensures your phone time directly converts to pipeline.

## **Step 2 | Build Your Script**

The script is already built inside the AI Script Builder, so you don’t need to reinvent the wheel. You will keep the framework and integrity of the script, but make it fit your personality and target prospect. It is designed to differentiate you immediately and deliver instant value.

You’re not another broker asking for policies. You’re bringing insight — showing business owners there’s a new strategy (a loophole) to get the best deal on the market. With a quick 15-minute call you can determine if or how the strategy applies and can show them how to negotiate the best deal in the market.

Keep it short, confident, and conversational. The Script Builder will walk you through every line and let you customize it for your niche or for stacking short-term revenue. Once you’ve got it built, you’re ready to start calling.

### **Step 3 | Objections + Feedback**

Naturally, you’re going to get objections — both from prospects and from yourself. That’s part of the process.  
The goal here isn’t to avoid objections; it’s to collect them, refine them, and use them to sharpen your script. The AI script builder has the objection handling framework and you will use that to continually improve your objection handling.

### **Write Down Objections**

Every time you get a new objection or a tough response, write it down. Drop it into the AI Script Builder and ask for feedback or variations on how to handle it. You can also reach out for direct support — we’ll walk through it together and tweak your messaging to fit your tone and style.

### **Diffuse The Objection**

Every objection gets one simple response:

“Not a problem.”

This diffuses the objection, allows you a minute to think of a rebuttal, and then go back in for the ask.

## **Step 4 | Build Your Prospecting Block**

The Revenue Stacker Prospecting Block is designed to help you generate appointments fast — by creating a structured window where you can focus entirely on cold calls and stacking new opportunities. This is the engine that feeds your 90-day revenue push.

### **When to Run It**

Do it first thing in the morning — before the day hijacks you. Start at 7:30 a.m. or 8:00 a.m. and commit to a 90-minute block.

Break it down into:

* Two 40-minute sprint sessions
* One 10-minute break in between
* Target 4X per week
  + Monday - Thursday
  + Friday Flex Block
  + 200 Calls
  + 6-10 Prospect Interview Calls

### **How to Run It**

1. Set a timer for 40 minutes.  
    The clock creates urgency and keeps you from overthinking.
2. Shut off distractions.  
    No phone. No email. No scrolling.
3. Work from your list.  
    Hit 25 calls per sprint (≈ 50 calls total).
4. Mark your calendar as *busy* — this is a non-negotiable meeting with your future revenue.  
    Communicate to whoever needs to know: account managers, team, spouse, kids, or anyone else.
5. Immediately after, run a 30-minute “Reactive Block.”  
    This is when you check emails, return calls, and handle anything that came in while you were focused.

### **Afternoon Flex Block**

Add a second short block — 15 to 30 minutes — later in the day.  
 Use it as a *release valve* for missed calls, follow-ups, or quick re-engagements that popped up after your morning session.

### **Calendar Setup**

Create three recurring events in your calendar:

* Revenue Stacker Prospecting Block (AM) — 90 min
* Reactive Block — 30 min
* Revenue Stacker 2 (PM) — 15–30 min

## **Step 5 | Manage Your Calls + Opportunities**

### **Manage Your Calls**

Every call you make fits into one of two categories: cold or follow-up.

#### Cold Calls

* A *cold call* means you’ve never connected with this contact before.
* When you call, leave a voicemail and immediately log the attempt.
* Use whatever tool fits your workflow — Excel, CRM, or your X-date software — to track call attempts (Call 1, Call 2, etc.).
* Space calls every 3–5 days, leading up to roughly 10–15 days before the renewal.
* The goal each day is 50 total dials or touches, not 50 new prospects.

#### Follow-Up Calls

* The moment you’ve made contact (decision maker or gatekeeper), mark that lead as a follow-up.
* When you start your daily block, always call your follow-ups first.  
  + If you have 5 follow-ups → make those 5 first.
  + If you have 10 → make those 10.
* Once follow-ups are complete, fill the rest of your block with cold calls or voicemail re-touches.

**15 Minute Call Decision**

Determine ahead of time if you are going to take the 15 minute calls during your call block or if you are going to schedule them out.

Two options:

* Take it live on the call - simply adjust your call block ahead of time
* Schedule the 15 minute call for later that day or later in the week

**Manage Your Opportunities**

You’re always working across a rolling four-month window — the current month plus the next three.  
 Each month represents a mini-pipeline that needs its own balance.

* Review your X-date pipeline weekly.
* Look at each active month and count how many open opportunities (prospect interview calls or live deals) you have.
* If one month is light — for example
  + December → 10 opportunities
  + November → only 2 — then shift your next couple of days’ calls toward the lighter month.

The objective: keep every month in play. Balanced months = consistent cash flow = steady momentum.

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## **Step 6 | Prospecting Confidence**

Confidence comes from keeping commitments. The fastest way to build belief in yourself — and in your system — is to do exactly what you said you would do. If you put a prospecting block on your calendar, protect it, show up, and run it.

Each time you keep that promise, your confidence compounds. Each time you skip it, it chips away.

But sometimes, something blocks you. That resistance — whether technical or mental — is what we call a revenue leak. Your job is to find it and plug the leak.

**Identify the Revenue Leak**

If you’re sitting down to prospect and it’s not happening, pause and ask:

* Is it a system leak? (weak list, missing numbers, poor prep?)
* Is it a structure leak? (you didn’t shut off email, too many distractions?)
* Or is it a mindset leak? (call reluctance, fear of rejection, stories about losing clients?)

Whatever shows up, you don’t cancel the block — you use it to solve the problem.

### **Mindset Leak**

### Run the Battle Beliefs Framework

* Identify the belief | What’s the problem with that? What’s stopping me?
  + ex. If I shut off my phone and email my clients will leave me
* What makes me believe this?
* What story am I telling myself about it?
* What advice would I give to someone else in this same spot?
* What’s a better story I can tell?
* What do I want to believe moving forward?

Write your answers out. Uncover the revenue leak and what’s holding you back. Reframe the story and belief. daily and move forward with the prospecting block.

**System + Structure Leak**

Identify the system or structure leak and make an adjustment to the game plan. Address the challenge, make adjustments, and adapt to move foreward with the prospecting.