

Wed Dec 17th

North Star: \$10m as fast and easily as possible  
Immediate Goal: Getting funded → Biz sale or Credit

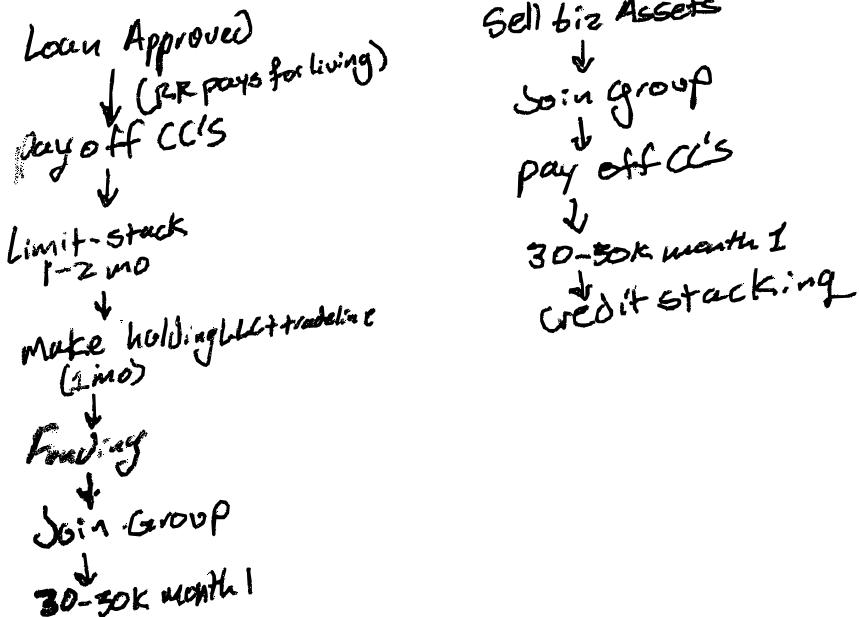
- ~~Switch address with Wisconsin Govt. (15 min)~~
- ~~Compile list of previous clients + prospects.~~
- ~~2pm call with Market Insider~~

Biz sale kills 3 birds with 1 stone

- I'm out & don't have to manage

• pays off CC Debt = more funding access

• provides Runway for new high-leverage biz model.



Thursday Dec 18th

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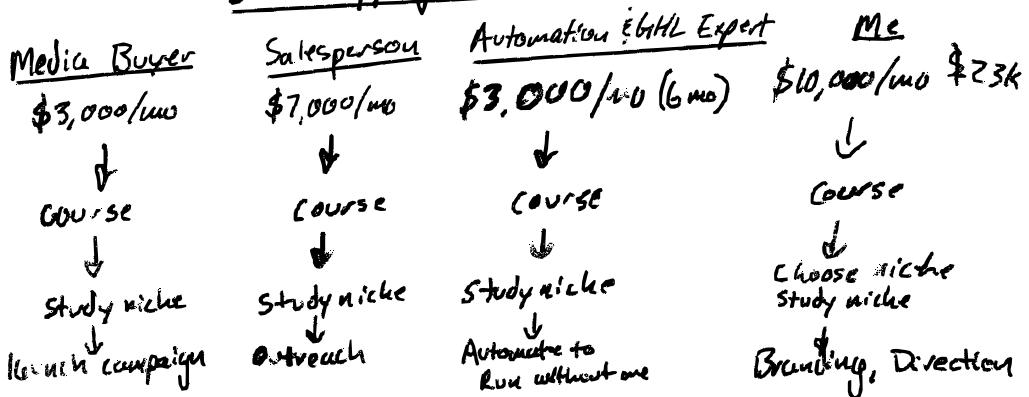
Next Steps:

- Consolidation Locan → waiting for updated statement (1 week)
- Biz sale → call Christian

Today

- Make Kurios website (for lead gen & finding)  
w/ Stripe checkout LinkedIn + update FB  
+ update to F
- Reach out to Ryan & other lead seller
- Text message sent
- Get H @ S in design group
- Write text to send to all concrete people

Bootstrapping to 277k/mo w/ A Players



Scenario 0 - no loans, no biz sale

↓  
Resell leads for Ryan or someone in group

FIND LEAD SELLERS

Broker Method (can start without course)

- Still build Brand (website, LinkedIn)
- Reach out to 50 buyers/day + 50 sellers/day
- Learn about niche + offer

12/19/25

- go through course
  - pick demographic
  - build list of buyers (Ex: ex-chefs)
- update linkedin profile to reflect website target changes + make header.
- make "Book Call" pages instead of static page
- build an app & emails

Demographic: High Networth Individuals

- can cross-sell trust setup, tax optimization, etc

soon:

- Form Holding LLC (for funding)
- when updated statement comes out, submit to Sof!

\$2500 per closed franchise

3 per booked App / live transfer

12/20/23

- generate 1000 new pi leads
- finish funnel + calendar
- make funnel/website changes
- Reach out to MVA sellers/partners
- update Facebook page
- build/find auto email finder
- add personalized messages + emails to 18k

Take 2-3 calls/day - 5 client

Month 1

9000 - 1500 per client  
45000 - 7500 Rev  
22500 - 37500 profit  
minus 4,500 - 7500 hire fund  
18K left - 30K left  
minus 9,000 - 15,000 CC debt  
minus 4,500 - 7500 tax fund  
4500 - 7500 company profit

Live off RR long as you can

12/21/2025

~~• work on automation~~

Soon:

- Form Holding LLC (for funding)
- When updated statement comes out, submit to Sof!

EQU - Sell Company / Brand for 9.6+M

- \$150-200K profit if automated
- \$300-400K/mo Rev  
= 6-8 clients @ \$50K/mo

December

- Start taking Sales calls (3/day)  
Right after Christmas
- before Christmas, study nich (10 hr block)

January

- At 3-10 clients
- \$27,000 - \$90,000+ /mo

Feb

- Hire Cracked SEO, Automation  
& Salesperson  
(who do I know in B2B Sales?)

March

- Increase Quality of lead (Go deep w/ best clients)
- Internal automation  
- maximize team's output

April

- 5 - 10 clients
- \$100K/mo - 500K/mo

May

- Get Ready to sell w/ Mark Daoust

June

- optimizing + maximizing

July

- Sell Business

12/27/25

- Make sure automation is ~~paginating~~  
correctly
- Build auto query
- Build personalized message + email
- connect to leadist outreach

~~join linkedin groups in vertical~~

- Connect email to receive replies in GHIL
- Spend 2 hour studying niche & Buyer pain points
- Build onboarding funnel w/ payment page
- add GHIL update automation for Gr-Sheet

12/23

- on website change time to first level
- ~~test automation~~
  - if failing, do manual update of queries

12/24/23 (wed)

- Start Lentist Campaign
- Swipe 1000 leads

Merry  
Christmas!

12/26/2025

- Change contact email to reference linkedin (15 min)
- Deletable (30 min)
  - Change time to first lead
  - Change trust form  $\rightarrow$  DTP in Hero
- Connect webhook w/ new Quiz Q

### Email

- Spinoff domain - warm up
  - Can it be in the same workspace?
- While warming, send 48 emails/day with main acc +
- Blast 500 emails/day
  - I saw you're the ~~position~~ @ Company, are you currently buying leads?

### 5 Buyers

		Month 2 (quality)	Month 3 (quality)
\$9K	$\rightarrow$ drop	+ ↓ 3-6 buyers (pipeline full)	75K/mo
\$9K	$\rightarrow$ drop		
\$9K	$\rightarrow$ scale	$\rightarrow$ \$36K	50K/mo
\$9K	$\rightarrow$ scale	$\rightarrow$ \$18K	
\$9K	$\rightarrow$ scale	$\rightarrow$ \$45K	100K/mo
		$\downarrow$	\$99K/mo

### 50 sales calls

### 5000 contacts

Just closing 5-10 over 6 mo may get you to  
your goal

Friday → Connect leads to Reddin  
→ setup subscription

- Change lead list messaging

- ~~transcriber Max Cap II~~

- put law firm name & website in form

- Remove questions from form

Lovable  
- increase leads  
delivered

~~Enrich Data (1hr)~~  
- Remove non-PL leads  
- Verify Email

\$2K/case  
1000+ Leads/mo

10-15% conversion

10 - 25%

# test pack

# clients before  
it gets weird

\*

20K - 30K minimum

20,000 avg

2,000 - 5,000 per close

1,3-4 calls/day

4/week closed

\$30 - 50K/mo

from just a funnel  
(automated)  
& ads (hired out)

Just manage 20-30  
client accounts  
(can be hired out)

12/28/25 - Monday

- clean data
- make website fit cases on demand
- launch email campaign w/ follow-up

Monday 12/29/25

- Call friend
- Make phone fix for him
- Add text option to Email campaign
- Charge Jonathan (\$500)
- Create emails for unqualified leads
- Scrape another 500 leads off partnership
- Affiliate Marketing Manager → Brokering cold emails
- Train Sales Training
- Follow 20-30 qualified contacts
- Make 10 different photo ad creatives using templates (2 hrs)
- Update AdWords FB Ads

Tuesday

- Counteroffer to Max (CFA)
- Follow 20-30 contacts
- Change from check email domains
- Follow-up emails
- Add more emails

- Add contacts to Leadlist campaign

- Get 1000 Extra Leads

- Emails warming up. In 2 weeks can send 300/day  
- In meantime launch Ad campaign as well  
- Map out onboarding & off agreement

)



### NORTH STAR

- Business sells for \$10M
- \$150-300K/mo profit
- Working without me

#### January

- Get to 10 clients brokering (\$20K/mo)
- Cold email 3000 prospects, 300/day

- Launch Ad campaign (By Wednesday)

- Continue scaling until you hit 2-3 meetings each day

- hire media buyer

Rev: 110,000 profit: 60,000

#### February

- Start taking meetings on own  
- Pay more for his media buyer to teach mine

- Get to 10 of my own clients

- Then dial back to 4 clients/mo

- hire SEO guy

Rev: 110,000 profit: 60,000

#### March

- Lead quality & internal systems

- Majorly scale SEO & GED & YouTube ad

- Automate everything

#### April

- SEO starting to see some results

- Leads getting cheaper

- Rev: \$200,000 profit: \$100,000

#### May

- Leads getting cheaper

- Took 5 best clients & campaigns & scaled

- Rev: 250,000 prof: 125,000

- Put up for sale

#### June

- Scaling & systems refined

- \$500,000/mo profit: 250,000

- Selling process

#### July

- Selling process

- Sold for \$10M+

12/31/25

Wednesday (SET TIMER  
(4 hrs 15 min of work)

- follow 20-30 contacts (10 minutes)
- ~~leads~~ ~~Exx Leads~~
- Launch first ~~image ads~~ (1 hour)  
(to form)
- Fix ~~detecting notifications~~ (2 hrs)
- Open boundary email w/ feedback to GPT (generativedoc)
- Refine sales script (day)
- Run through sales call with GPT (30 min)
- Follow-up with positive reviews

- 4 pm - Party

Thursday

- ~~Facebook Ad Set Up~~
- ~~Call w/ precision (1 hr)~~

- \* - Follow-up w/ All Email Replies (15 min)
  - Add contacts to lead list (check messages)
- \* - Jonathan Roofing leads (5 - 20 min)
  - ~~3pm Call back (30 min)~~
  - ~~Same for 1000 leads~~



NORMAL STAGE

$$\begin{aligned}
 & \$9.6M \text{ Biz Sale} \\
 & \$266K/\text{mo} \text{ Profit} \rightarrow \$800K/\text{mo} \text{ Rev} \\
 & = 2,666 \text{ MVA Leads/mo} \\
 & = 88/\text{day} \\
 & 8 \text{ clients at } 100K/\text{mo}
 \end{aligned}$$

JANUARY

- First Two Weeks
  - Daily Sales Practice
- EMAIL CAMPAIGN
  - ↳ Send 400/day for 8 weeks
  - ↳ 2-3 sales calls/day
  - ↳ (starting week 3)
  - ↳ can scale

• META AD CAMPAIGN

↳ \$350/week (2 weeks)

↳ 2-3 sales calls/week

(starting week 2)

↳ can scale

Should get

2-4 clients

\$6 - \$12K/mo

February

- Hire Salesperson (base + commission)
  - 3-4 sales calls/day
- Focus on scaling client acquisition
  - and aggressively collecting testimonials

Enough to get

10-20 clients

\$50 - 150K/mo

March

- Hire Media Buyer - Start testing
- Hire SEO Guy - Start building
- Less sales calls → Salesmen moves to manager
- Hire Automation Guy
- Focus on internal quality, self-sufficiency, and efficiency

Keep 8 clients

@ \$100K/mo + ea

April

- Work on asset control and organization
- Everything Automated & In-house
- Refined systems & SOP's
- Start getting offers for Biz

After Sale of Biz

- Make sure money's protected & structured

- invested wisely for true passive income

- The homes & cars I want

- The adventures I want

- Friday 01/08/26
- Charge Jonathan
  - Roofing Leads
  - Charge Tony (call page, have setup auto-zap)
  - Scrape 1000 leads
  - refine sales script (30 min)
  - Sales call with GPT (30 min)
  - Onboarding Email Sequence (1 hr)
  - Onboarding CRM automation (30 min)

### Sat

- Temescal (12pm)
- Machina

### Patrick

Call about setting up call center  
300 CPL  
Sell for \$1000

### Sun

- haircut 2pm
- Send Share Resources
- Call today
- Make Sure ~~is off~~ is on
- make sure lead from Note is on

### North Star

- \$9.6M Biz Sale
- Nice House, financial freedom, toys
  - traveling, music, adventures, Big Projects
  - Fully Thrifted, Political Campaigns

### January

- 28 days left

#### Week 1+2

- 100-200 emails/day (1-2 pos replies daily) (testing)
- testing ads (70/day) (shoot for sub \$200 CPA)
- practicing sales, mapping out structure, building automation

#### Week 3-4

- 300 emails/day (2-3 pos replies daily)
- testing ads (\$100/day) (shoot for sub \$150 CPA)
- 1-2 sales calls/day

1-2 Clients by End of Jan (\$3K-10K/mo)

### February

### DFY (REDIT REPAIR TO BIZ)

- Optimizing + Testing Ads + Emails (scale till 2-3 calls/day)
- Once at 3-4 clients (\$9k-\$24k)/mo
- Hire Client Manager / Closer (Shane?) \$4-7k/mo commission

- take sales calls

- handle re-ups

- client management, reporting

- lead flow + quality

- Get Cost per Close below \$1k

- 2-3 sales calls per day (3-4 clients/week)

- Hire Call Answerer... Sell calls for \$400+ (better margin)

- Focus on collecting testimonials

Really focus on lead quality and targeting

10-15 clients by End of Feb (\$30-100k/mo) +

### March

- Sell 3000 leads
- 1-2 sales calls per day
- sales guy also handling lead buy partnerships

- Hire Automation Guy (2-3k/mo)

Automate everything before moving on

### 15 clients by End of March (\$200-300k/mo)

### February

- 1-2 sales calls/day (Extremely tight filters)

- Cut off 80% of clients and

Scale the 3 best clients to

20+ leads a day.

- hire Media buyer

- hire SED

- Strive to get CPL below \$100

and cost per client acquisition below \$500

3 clients @ end of Feb (\$300-400k/mo)

(@) 10+ live transfers/day

### April

Biz working and growing without me

All steps of process internal (not dependant)

\$1M+/mo Rev (\$800-500/mo profit)

### May

Start talks to Sell (M. Daoust)

Keep automating + improving processes

Sell biz for \$10M+

Monday Jan 5th - week goal is 2 sales calls

\*

- Launch LP campaign & shut off lead form ~~campaign~~ (1 hr)
- Test Retractify in Email
- Generate other versions of winning Ads (30 min)
- upload leads from Friday & today to campaigns (10 min)
- Make sure you're getting notifications
- Reply to All replies (10 min)
- Scrape 1000 leads (10 min) ~~send email / transfer list~~
- Call Patrick - ask about service ~~(no live transfers)~~
- Update Sales Resources & Refine ~~(no live transfers)~~
- gather list of concrete prospects

~~SALES PRACTICE GIFT (30 min) + write out potential~~

~~SWITCH TO LIVE TRANSFERS (5K, 10%) /~~

{ Reliability }

TUES

- live chat widget on site
- update LinkedIn to match website (10 min)
- update Twitter campaign (10 min) ~~(live transfer)~~
- update FB to match (focus on cases)
- update Emails to match

~~MORE TARGETED LIST OF COMPANIES~~

~~LinkedIn Reptiles, Enrich w/ phone~~

~~List of companies from Exu~~

~~Build video scripts~~

11

Closer - 10% of profit on closes! 5% on Rev-ups

400-500+ /  
per close 400-41K  
per

10 clients  $\Rightarrow$  5 re-ups  
 $= 4K(\text{matches}) \Rightarrow 4K-22K$

North Star - \$9.6M Biz Sale

I've done this before

January

Weeks 1-2 - Email Campaign sending 100+/day

- Ad campaign spending \$100/day (testing)

- LinkedIn campaign running

- Cold Call 2 answers/day

Weeks 2-3 - Email Campaign sending 300+/day

- Ad campaign spending \$100/day

- LinkedIn campaign running

- Have Shuan cold call 100/week

Goal: 20 calls, 1-2 clients, \$10-30K Rev

February

- Testing + Optimizing Emails (Shuan) (300+/day)

- Testing + Optimizing Ads (media buyer) (Hired)

- Goal is 1-2 calls/day

- Get Shuan on taking calls, cold calling too, ASAP

- Bring live transfers in-house.

Goal: 30 calls, 3-7 clients, \$30-\$70K Rev

March

- 50% of clients Rebuy \$25k ea, 2-4 clients, \$50-100k rev

- Double down on live-transfers, 60+ % margin

- Campaigns scaled to 2-3 calls/day

- Only signing live transfer clients (20 min)

Goal: 40-60 calls, 4-6 LT clients (6-10 total) \$120-200k Rev

\$50-90k profit

(Reinvest 70%)

## Book 1 Call This Week

Book 1 call & mix Scooby Doo

Wed - 3 weeks since joining Jakubs Program

9:00 start work

- Record script + save voice record (10 min)

- Make 3 B-Roll Ads (30 min)

- Record 1 video ad + Save Avatar (1 hour)

- Make 12 video ads (1 hour)

11:30 Timescale

14:00 - Launch Ad Campaign (1 hour)

## Thursday

\$10-50/call is possible!  
so 50-300 per close

- ★ • Turn off shitty traffic Ads
- ★ • Make versions that matches with more aligned promises
- Accounting For December (2 hours)
  - You can cut expenses by nearly half
  - ← if you don't you'll spend \$8-10k this month
  - Free up little room for next month
- Cancel Subscriptions (or half-off for all)
- Make list of contacts LinkedIn ads  
+ personal legacy firms

## Turn off Auto-pay

- make sure addresses are updated

- Don't pay loan for Jakub group

- credit score will tank for 6-7 mo

- Doesn't matter, don't need credit for a bit

- Hire Hunter Tobin to fix credit! get 100%

(\$1-5k to repair)

Gro to ATM 1x/week

- Budget \$400/wk

[Jan Goal: Close 2 clients]

## February

- Ads + Emails: 1-2 appts/day

- Hire Ads Guy (2k/mo)

- LN + Cold Calls: 1-2 appts/day

- Hire Appt setter + Closers

total: 2-4 /day - 1-2 clients/wk

End: 10-15 clients

(100 - 200k)

## March

- Keep 5-6 Best Clients (Focus on Live Transfers)

- Rebuys... \$20k - \$50k each

- \$100k - 300k/mo

Pause... Make sure I'm doing zero work and  
Clients are getting quality Before working  
on fulfillment

Continue Outreach

End: 10-15 clients, \$500k + Rev, \$250k + profit

## Next Steps: Bringing Fulfillment & Live transfers

In-house

- 500+ Leads/mo

Strategic Partnerships to \$1M/mo

## After Sale

Daily voice lessons

House in Pisac + somewhere else

- Both with studio

Drop 2 songlines for 2 years

Call Attendees (7 figs must respond)

Dewei

Dan Ellis - MKE

Mohammed Ahsan

Pierre Patrouillard

Stephen Palmer - MKE

Nicholas Lyons

Pierre Grodecky

Curious Mazel

Johan Carlberger

John Hester

Joseph Mosley

Junior Zoschke

Rick Wilsey

Rafael Hernandez

Friday 1/4/25

- Find someone to look over your email copy
- Update pricing Doc ? Sales Doc
  - \$15k: 35-50 Leads - 15% sign rate: keep 2k
  - \$25k: 20-30 live Trans - 35% sign rate: keep 6k
  - \$35k: 10-12 Signed cases - keep 10k
- Add 20-30 WI contacts on LinkedIn & FB  
(Every Day)
- Lead form campaign with winners (2 days/week)  
(1 hr)
- Scall LinkedIn group



Sales call Wed @ 10am PST - Max is joining

- Add "Head Media buyer" also generates leads for Reyes Browne
- says "My media buyer has been generating leads for Steiniger, Greene & Feiner since 2020"
- "I'm having my media buyer join the call". He worked with Steiniger, Greene & Feiner 1 client - \$2K profit to start

Sunday

SAT-SUN

Kinsey Cochran

### NORTH STAR

\$9.6M Biz Sale

Jan - make 1x cash withdrawal/week of 1200 sales...

\$171/day

January, 3 weeks left

1 - Ads - working on it I know 10-50 meetings are possible w/ static ads, and it's a really good channel for me

2 - E-mail - not really working, not many replies

3 - LinkedIn - collecting a couple friends/day

4 - Commitment

- Until other channels are proven, I, or one of my team, will make 50 calls a day.

$15 \text{ work days in Jan} = 750 \text{ calls}$

$= 7 \text{ booked calls} = 1-2 \text{ clients}$

Channels 1, 2, and 4 should book 1 call/day each starting next week

Jan Goal: 3 clients cash upfront

3 calls this week (\$250/call)

Monday - Robert B. 11am - Source: Direct  
- Lemons... use #'s that Max Said

Wednesday - Dagmawi G. 11am - Source: Meta Ads  
- Max will help close

Friday - Melodi N. 5:30pm - Source: Meta Ads  
↳ text Monday (he's a realtor?)

Sun

Prepare for Robert Call (30min)

Monday 1/11

- Make master Outreach list of 6000+
- Text method. - ask why tie booked (10 min)
- ~~Ask for date~~
- Book ads
- Refine script using master script (30 min)
- Change location (10 min)
- Follow 20-30 w/ contacts (10 min)
- Message linkedin connections
- Make up form simpler... focus on direct book call
- Add Prep to texts
- Add work as goal

Tuesday

- 1PM Call w/ Law Firm  
- Rich Hyde. Max will send email cc you and Patrick  
Should close within a week
- Follow 20-30 w/ contacts

Wed

- Set up call notes for Max to use &  
SEND call recordings to all contacts

M

Progress towards key progress

- Text Lucas to confirm time
- Team lead Sales call w/ Max + law firm
- 1-2 run sales call with Jeremy + law firm

- Change Jonathan

- Change Grego

New Goal: 3-4 meetings/day

Auto LN - Good, no changes needed

Manual follow - Good, keep steady, probably low ROI on time

Email - Not great, were expert to take a look

Meta Ads - Best, keep testing and get CTR below 1%

LN Posts - Start, high ROI with consistency

Instagram - Build Post, apparently highest ROI

Cold Calls - 100/day, quickest way to gain XP

In 2 weeks, cut out 80% least effective channels,  
scale 20% with Mores

Goal: 2-3 calls/day

Current: 1-2 calls/day

- probably able to hit goals with just ads

North Star

\$9.6M Biz Sale - \$300k/mo (or 200k automated)

Lewis LT - \$1k ea - 300 a month = 300k

Lewis OTP - \$350 ea - 857 a mo = 300k

So between 300-800 leads a month or LT's

5 clients @ 60k/mo (likely after 7-10 test batches)

will put you at \$300k/mo

So... Need to Close 10-15 MVA Clients ASAP

→ Book 50 meetings over the next 4 weeks

→ Aim to Book 2 a day

Ads at 3 meetings a week right now

Email - Fix, not getting results

LN - Really Good, post, get endorsed, etc

Cold Call - Hire 4-5 Comm Appt Setters

- Do this week... 50 calls Mon-Tues while building resources

Ads - 750 spent (testing)

3 booked calls (\$121 ea)

So \$1000 = 4-8 calls (for Next week or two)

5-8 calls total

1-2 clients

\$2K - 4K → 1-2x ROI (+ LTV)

In 2 weeks, I've got it down to \$50/call

so \$1k = 20 calls = 13 hours = 3-4 clients

= \$6-8K → 6-8x ROI

Goal: under \$50 per call

Cold Callers - Hire 4 @ \$20/apppt + 2% of close (\$300)

100 calls a day each - 1 booked apppt

2 churn - keep hiring

200-300 calls/day - 1 meeting each

2-3 appointments/day

each makes 400+/week minimum

if hitting KPI's

upto \$2,000/mo

January (11th today)

- 4-5 calls/week through ads - 9 by EDM

- Set up cold callers next week - another 5-8 calls

- Test more Ads

- Post on LinkedIn (grow aggressively)

3-5 clients/\$6k - 40k (live transfers)

(cut out 80% of outreach, here & scale 20%)

Shane - \$1500+ / week

February

- Hire Closer + Manager

- 5-6 calls/week through ads

- 6-8 calls/week through Cold Callers

- 1-2 calls/week through LinkedIn

By EOM, 12-15 clients, 24,000 - 30,000/mo

March

- Hire Ads guy + Automation Guy + SEO guy

- Launch Fulfillment side

- Automate Biz to be efficient & sellable

- Build SEO/GEO Brand

- Scale best 5-10 clients

- Apppt setters become pre-trained salespeople

April

- Now have a system to easily switch

between horizontal & vertical scaling

- This system is automated with:

Closer/Project Manager



May

- Refining systems + getting offers

Bigest Mistake So Far

- not being clear on offer

- switching costs.

Thurs - Jan 15th

- Follow 20-30 LN people
- Add "Not my agency/lander" checkbox to form
- OR phone verification

- Identify 20 multi-state firms to pursue
- follow/connect on LinkedIn with 20-30 of them
- write margin story/tell post
  - changedinketo revenue school
  - add featured link
- Refine strategy to contact list

- how else can I book 2 more calls/day without lifting a finger?
- Build LinkedIn
  - Goal is 1000+ connections in next 2 months
  - highest quality appointments

Ads can be 1 day/week (Sat)

LN can be 30 mins/day

Cold calls during the week (wait till phone is sat space)

100/day

Wait till you have testimonials before posting.

Friday

- 10-30 min call with data

- change something

- change story

- 2-3 cold calls with owned

- Sell Rank & Rents for low (Answer next week + test!)

well so

- Start Building Statewide Brand

- Simplify. Build Texas Infrastructure brand to get leads.

Saturday

- Go to town & get cash

Showers, go to town, get cash, eat

~~order code... implement plan~~

~~generate + upload photos to pages (30 min)~~

Sunday

CEO from Day 1

Goal 1: 4 calls/day (ads, email, LN, setters)  
- automate best as possible before moving on

Goal 2: Hire Closer & Manager (sell LT's in-house)

Goal 3: Bring Live Transfers in-house

Goal 4: get 500 LT's/mo through SEO

North Star

\$9.6M Biz Sale

\$300k/mo profit or \$200k/mo Automated

Around 1000 leads & live transfers

a month.

Start at 15% - 20%

Rebuys + bringing ops slowly in house

increases it to 20-30%

50% is possible with SEO or

other cheap acquisition channels

January

4-5 calls/week @ 200/call through Ads

- really a 1x/week thing, no live needed for

client acquisition

- Email 300/day, 3-41 calls/wk.

- 100 Cold Calls/day

- 3-5 LinkedIn Posts/week (pay for impressions)

Sat - Ads Sun - LinkedIn weekdays - cold call

End: 2 clients - \$6k - \$10k

February

- After 20 calls or so, feed to Claude Cowork, feed this spot to build entire business around best buyer profiles

Ads.

- Hire Closer & Outreach person to start taking calls - margin jumps to 20-25%

- books 2 calls/day

- hopefully 2-3/day ads & Emails

Closing 2-3 clients/week

- Hire Closer SEO & GED to start building

rankings (or partner w/ Jacky) & build a ton

of Brand value

- can sell leads to other services too - body shops, tuning

schools, chiropractors

- goal: Build 10 statewide brands (help center)

With websites & GMB's

50 leads each/mo = 500 leads/mo

Then find 3-5 multistate buyers

End: 10 clients, 15-20% margin, \$30-40k

March

- Bring live transfers in-house with real good AI + 2 good sales (20 LT's/mo, calling 60-70 leads/dy)

- 6-7% margin up to 30%

- still buying leads

- 10 clients + 5 rebuys = 60-135k minus pay roll + ad spend

= \$12k + 8,000

70K profit (roughly)

April

- Steady with the calls

- Invest heavily into SEO, GED, and GMB's

- 10 statewide brands

- team of 2 people

- verifying GMB's with Andrew @ \$5k ea

- 10 clients + 8 rebuys = 60-180,000

Get Claude Cowork ASAP  
↳ copy entire business + improve model off of transcript  
→ use to get really specific on niche + offer

CEO from Day 1

Goal 1: 4 calls/day (ads, email, LN, setters)

- automate best as possible before moving on

Goal 2: Hire Closer & Manager (sell LT's in-house)

Goal 3: Bring Live Transfers in-house

Goal 4: get 500 LT's/mo through SEO

North Star

\$9.6M Biz Sale

\$300k/mo profit or \$200k/mo Automated

Around 1000 leads & live transfers

a month.

Start at 15% - 20%

Rebuys + bringing ops slowly in house

increases it to 20-30%

50% is possible with SEO or

other cheap acquisition channels

January

4-5 calls/week @ 200/call through Ads

- really a 1x/week thing, no live needed for

client acquisition

- Email 300/day, 3-41 calls/wk.

- 100 Cold Calls/day

- 3-5 LinkedIn Posts/week (pay for impressions)

Sat - Ads Sun - LinkedIn weekdays - cold call

End: 2 clients - \$6k - \$10k

February

- After 20 calls or so, feed to Claude Cowork, feed this spot to build entire business around best buyer profiles

Ads.

- Hire Closer & Outreach person to start taking calls - margin jumps to 20-25%

- books 2 calls/day

- hopefully 2-3/day ads & Emails

Closing 2-3 clients/week

- Hire Closer SEO & GED to start building

rankings (or partner w/ Jacky) & build a ton

of Brand value

- can sell leads to other services too - body shops, tuning

schools, chiropractors

- goal: Build 10 statewide brands (help center)

With websites & GMB's

50 leads each/mo = 500 leads/mo

Then find 3-5 multistate buyers

End: 10 clients, 15-20% margin, \$30-40k

March

- Bring live transfers in-house with real good AI + 2 good sales (20 LT's/mo, calling 60-70 leads/dy)

- 6-7% margin up to 30%

- still buying leads

- 10 clients + 5 rebuys = 60-135k minus pay roll + ad spend

= \$12k + 8,000

70K profit (roughly)

April

- Steady with the calls

- Invest heavily into SEO, GED, and GMB's

- 10 statewide brands

- team of 2 people

- verifying GMB's with Andrew @ \$5k ea

- 10 clients + 8 rebuys = 60-180,000

## Monday, Jan 19th - SALES FOCUS

8:00am

- make call script from transcripts
- practice 2-3 times with client (train transcripts)
- 12pm call w/ Scott Barney
- 12:30pm call Jonathan Mather
- 1:00pm call Josh Sweeney (no show)
- 1:30pm call Ross Robins
- make post for closer (research) (1hr)

!! • Export Exu contacts & cancel

- Text all prospects to follow up (from last week)

• Send call recordings to Max & Jeremy

• add all resources to repo (Google Drive, Wyoming ads)

## Tuesday, Jan 20th - Ads Focus

• Build Separate LP w/o cases (leads? LT focused)

• Make 3 versions of ad copy

- leads & live transfers
- use call transcripts of best buyer profiles

• Transcribe last Sunday's call

• send follow up email

• 1:30pm call w/ Danny (confirm first)

• 3:00pm call w/ Josh Sweeney

• Assess financial situation & policy

• no more need buy till closed deal

\* • Call last week's prospects & close (23%)

• Launch new Ad sets (per Set LP, All I set focus)

## Wednesday, Jan 21

• 9:30 call w/ Max

• Change LP, FB, email campaign & signature to fit  
Email template to buyers new messaging

!! • follow up w/ Lucas & others from last week

!! • 100 deals (leads cost per call in half)

• 1:00 pm WTA training

• 5:00 pm call w/ Michael Sharts

• TTA ad back calculator

• TTA policy reports

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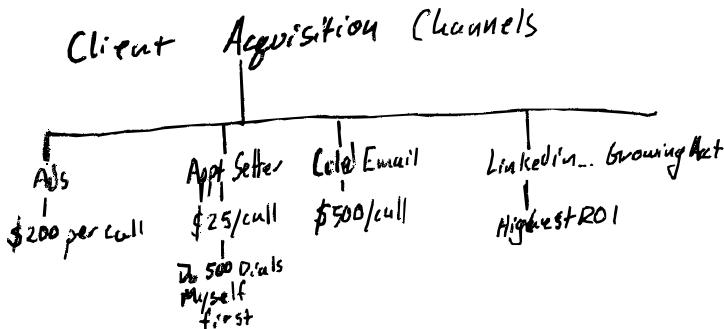
• TTA policy reports

• TTA ad back calculator

• TTA policy reports

Wednesday 1/21/26

## AUDACITY



What am I scared of?

- running out of money
- cold calling and no one picks up
- cold calling and everyone's a dick

Project: SEO - TTA good fallback...

Even 20 leads/mo could set

me up nice  
possible in a month or two if I attack  
ai SEO & niche tactics

Focus: 2-3 sales calls a day at <100/call  
- until one closes, stuck at 1/day from Ads  
- get the other 2/day with appointment setters  
- Make 500 calls this week while waiting for groups

### This Week

- 300 calls + follow ups
- Add Calc, Police Rep, and others to TTA
- Apply all the ai SEO tactics
- Set up automations

### Weekend

- post in FB groups and on LinkedIn
- for App Setters.

### Next Week

- hire 4 app setters

\$3000 spent for 12 calls = \$250 per call

## Thursday

- I consider any circumstance that forces me to turn inward and surrender to God As a Win
  - ~~call back correct credit strategy payment~~
  - !! ~~fix email sequence copy (don't mention leads, \$8-100 words adapted from ads (~1 min))~~
- Deal Closed - \$315

## Friday

- ~~make sure Ad destination work~~
- !! ~~Set up Patrick Bookings System for French Campaign~~
- !! ~~Put out Israel form~~
- ~~Follow-up with last-weeks prospects (4/pw) - from previous phone #~~

## Transcribe Jason call

- 5:30 call with Deanic, max, patrick's
- Charge Tony - 250
- Charge Jonathan - 500
- transcribe David call + add to sheet

## Saturday

- ~~start Ad Billing~~
- relax

~~charge Jason~~

Sunday  
Meditate  
Shower  
Clean Room

- Go to town
  - bring + do laundry
  - get cash (1000) at ATM
  - Eat + Work
  - build 8 contextual links for Willard + update
  - build links for slack guy + update (200)
  - add missing call summary + sheet

Make strict cost cutting plan

→ 1000 leads / week

→ 1000 calls / week

→ 1000 emails / week

→ 1000 texts / week

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- This week:
- Closed 4 clients (\$12k)
    - Owned by Salma (closed \$3-6k)
    - Closed 1-2 from last week (\$3-6k)
  - Build 4 niche sites for TTA ? 4 reddit posts

Monday 01/26/26

- Enter Chamber
- install cloudbot on vps... get it to implement Step 1

Cloudbot will Replace my Subscriptions

- 2:30 Call with David
- 3pm Call with Chip

Transcribe Chip call + add to sheet

Follow up with Ross Robin & Scott Turner

- Send Ross Robin Email + Appointment

Figure out how to do conference calls

Cloudbot takes call recordings ?

Tuesday

- call @ 9:30 w/ Daniel
- Charge gen 0
- download Cloudbot on our VPS
  - ask it what it can do for you, get to know it
  - import files + organize
- Send Carlos call recordings
- Send Daniel Email
- follow up with Scott
- respond to concrete Affiliate
- respond to Carlos

Wednesday

- Scale ads 10%
- Turn off lead-only campaign if LT keeps closing

#1 Goal: 2-3 calls/day under \$100 each and 30% close rate.

- Ads is working, just need to get CPBC down
  - ↳ spend a few days learning all you can about running Ads
  - ↳ visualize 2-3 calls a day <100 each
- Other focus Needs to be TTA
  - ↳ build network of sites
- Ask Max for Case Studies so you can bring closing in-house

Macbook air	- 1200	\$3k ÷ .15
Mac mini	- 600	
Valentines day	- 300	
3 weeks Tel Aviv rent	- \$400	

3 weeks Tel Aviv rent - \$400

\$3k ÷ .15

\$20k Profit in the next month

#2 goal: Automate + kill subscriptions

- Ads creation
- transcribing calls
- updating buyer profiles
- rescheduling calls
- sending call summary to sheets

Then  
TTA build

End of Jan

- Sales process automated
- 3-4 clients total (9-12k) (profit 2-4k)
- Ad creation Automated.
  - 70% slight variations of what's working
  - 30% SB37 ad set

End of Feb

- SEO mostly automated

## Wednesday Jan 27

Set Up Ringba for calls  
Respond to concrete affiliates

12:45 - text message reminder about 2 calls  
 1:00pm mba + training  
 2:00pm Call with Ross/Robin  
 2:30pm Michael Shultz

Remind Jeremy to send email to Michael  
 Remind Jeremy to send Owner a 30k proposal  
 7pm call w/ Carlos

## Thursday

- Add cards to high-level
- Add Case Studies to LP (reviews slide)
- fix notif automation - New campaign
- Send to diff Google Sheet
- fix calendar hours (might already be fixed)
- Call Owner & Julian
- 3:30 Call with Sean SUG
- 4:30 call with Max &
- share Google Sheets, docs
- Setup my own conference calling  
go over Carlos script - add notes

### TTA

- AZP Register + All trust center
- Make sure Automation is still setup

## Friday

- Charge Southern & Tony
- check in w/ Sue & Patrick needs
- call Waples Paul Guy

## Saturday

### North Star

\$9.6M Biz Sale  
= 200K/mo automated profit

Purely Referrals = 100+ ongoing clients

Goal: Smooth + Automate what you already have

Get mac mini ASAP for personal assistant  
& building data vectors  
Match buyers with vendors

### End of Jan

- Maximize current profit margins

• Set up Ringba

EOM 1-3 clients closed total (\$3-9500)

- 2K to 4K

## February

- |   |   |
|---|---|
| 1 | On the 5th in Lima get mac mini                                 |
| 2 | - start feeding data  |
| 3 | Automate All current processes                                  |
| 4 | - ad creation   |
| 5 | - call -> transcript -> database                                |
| 6 | - writing follow-up email, checking for approval before sending |
| 7 | - rescheduling appointments                                     |
- New Campaigns - trust Andromeda (At 30+ booked calls  
get cost below \$150/call)

### Hire Closer

Then Pour money + Time into TTA

EOM 10-12 clients total (30-40K/mo) (50% profit)

15-20K/mo profit

## March

TTA getting 2 leads/week

Still closing 2/week as referral

Automate rebuy checking with Max

Automate National + TTA SEO campaigns

EOM 13-15 clients + 8 truck leads = 45-60K

60% profit

27-36K profit

4-5K to me

## April

SEO getting 5 leads/week

Still closing 2/week as referral

chatgpt ads

EOM 15-20 clients + 20 truck leads

= 65-80K, 70% profit

45-56K profit

7K-9K to me

### Optimize Credit

L7 get 200K+

### File Taxes