

# Module 4: Prospecting & Lead Generation

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## Action Worksheet

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Name: \_\_\_\_\_ Date: \_\_\_\_\_

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### Part 1: Prospecting Math

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Calculate your personal prospecting requirements based on your goals.

#### Your Monthly Goal

Number of closed deals needed per month: \_\_\_\_\_

Average deal value: \$ \_\_\_\_\_

Total monthly revenue goal: \$ \_\_\_\_\_

#### Your Conversion Rates

Based on your recent experience (or use industry averages if you're new):

**Contact Rate** (% of outreach attempts that result in conversations): \_\_\_\_\_%

**Qualification Rate** (% of conversations that become qualified opportunities): \_\_\_\_\_%

**Close Rate** (% of qualified opportunities that close): \_\_\_\_\_%

#### Required Activity Calculation

Working backward from your goal:

**Closed deals needed:** \_\_\_\_\_ ÷ Close rate (\_\_\_%) = \_\_\_\_\_ qualified opportunities needed

**Qualified opportunities needed:** \_\_\_\_\_ ÷ Qualification rate (\_\_\_%) = \_\_\_\_\_  
conversations needed

**Conversations needed:** \_\_\_\_\_ ÷ Contact rate (\_\_\_%) = \_\_\_\_\_ total prospecting  
contacts needed per month

**Daily prospecting contacts required:** \_\_\_\_\_ ÷ 20 working days = \_\_\_\_\_ per day

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## Part 2: 30-Day Prospecting Plan

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Create your personal prospecting plan for the next 30 days.

### Week 1: Foundation (Days 1-7)

**Primary Focus:** List building and preparation

**Daily Activity Commitments:**

- ☐ Identify \_\_\_\_\_ new ideal prospects
- ☐ Research \_\_\_\_\_ prospects (business, current situation, pain points)
- ☐ Make \_\_\_\_\_ prospecting calls
- ☐ Send \_\_\_\_\_ emails
- ☐ Connect with \_\_\_\_\_ prospects on LinkedIn

**Success Metric:** Build list of 50+ qualified prospects with contact information

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### Week 2: Launch (Days 8-14)

**Primary Focus:** Multi-channel outreach

**Daily Activity Commitments:**

- ☐ Make \_\_\_\_\_ prospecting calls
- ☐ Send \_\_\_\_\_ personalized emails
- ☐ Connect with \_\_\_\_\_ prospects on LinkedIn
- ☐ Leave \_\_\_\_\_ voicemails
- ☐ Follow up with all responses within 24 hours

**Success Metric:** Schedule \_\_\_\_\_ discovery meetings

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## Week 3: Follow-Up (Days 15-21)

**Primary Focus:** Persistence and relationship building

### Daily Activity Commitments:

- ☐ Follow up with \_\_\_\_\_ non-responsive prospects from Week 2
- ☐ Make \_\_\_\_\_ new prospecting calls
- ☐ Engage with \_\_\_\_\_ prospects on social media
- ☐ Send value-add content to \_\_\_\_\_ prospects
- ☐ Conduct \_\_\_\_\_ discovery calls

**Success Metric:** Convert \_\_\_\_\_ prospects to qualified opportunities

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## Week 4: Optimize (Days 22-30)

**Primary Focus:** Scale what's working

### Daily Activity Commitments:

- ☐ Make \_\_\_\_\_ prospecting calls (focus on best-performing approach)
- ☐ Send \_\_\_\_\_ emails using highest-converting template
- ☐ Ask \_\_\_\_\_ satisfied clients for referrals
- ☐ Attend \_\_\_\_\_ networking event(s)
- ☐ Continue baseline prospecting activity

**Success Metric:** Identify and document 3 optimization insights

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## Part 3: Multi-Channel Strategy

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Design your approach for each prospecting channel.

### Phone Prospecting

**Best**                      **times**                      **to**                      **call**                      **my**                      **prospects:**

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**My opening statement:**

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**My value proposition (one sentence):**

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**My call-to-action:**

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**Voicemail script:**

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## **Email Prospecting**

### **Email Template #1: Initial Outreach**

**Subject**

**Line:**

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**Body:**

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**Call-to-Action:**

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### **Email Template #2: Follow-Up**

**Subject**

**Line:**

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**Body:**

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**Call-to-Action:**

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## **LinkedIn Strategy**

**My LinkedIn profile headline:**

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**Connection request message:**

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**Types of content I'll share (check all that apply):**

- ☐ Market insights and trends
- ☐ Success stories (with permission)
- ☐ Educational tips and best practices
- ☐ Industry news and commentary
- ☐ Behind-the-scenes of my work
- ☐ Other: \_\_\_\_\_

**Posting frequency:** \_\_\_\_\_ times per week

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## Referral Strategy

**My referral request script:**

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**How I'll make referrals easy:**

- ☐ Provide one-page overview to share
- ☐ Offer to make introduction myself
- ☐ Follow up quickly on referrals
- ☐ Keep referrer updated on outcome
- ☐ Thank and reward referrers

**Target: Ask for referrals from \_\_\_\_\_ clients this month**

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## Part 4: Ideal Prospect Profile

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Define your ideal prospect to focus your prospecting efforts.

### Demographics

**Industry/Type:**

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**Geographic**

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**Location:**

**Deal**

**Size/Volume:**

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**Experience**

**Level:**

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**Property**

**Types:**

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## Psychographics

**Their**

**Goals:**

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**Their**

**Challenges:**

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**Their**

**Values:**

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**Decision-Making**

**Style:**

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## Where to Find Them

**Online:**

☐

LinkedIn

groups:

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☐

Facebook

groups:

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☐

Real

estate

forums:

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☐

Other:

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**Offline:**

- ☐ Real estate investor meetups
  - ☐ Chamber of Commerce events
  - ☐ Industry conferences
  - ☐ Networking groups (BNI, etc.)
  - ☐ Other: \_\_\_\_\_
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## Part 5: Overcoming Call Reluctance

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Identify your specific barriers and create strategies to overcome them.

### My Call Reluctance Triggers

What specifically makes me hesitant to prospect?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Mindset Reframes

For each trigger above, write a more empowering perspective:

Trigger	#1	Reframe:
<hr/>		
<hr/>		
Trigger	#2	Reframe:
<hr/>		
<hr/>		
Trigger	#3	Reframe:
<hr/>		
<hr/>		

### Practical Strategies

What specific actions will I take to make prospecting easier?

- ☐ Schedule “Power Hour” for prospecting: \_\_\_\_\_ (time) every day
- ☐ Start with warm-up calls to existing clients

☐ Partner with \_\_\_\_\_ for accountability

☐ \_\_\_\_\_ Set \_\_\_\_\_ mini-goals \_\_\_\_\_ and \_\_\_\_\_ rewards:

\_\_\_\_\_

☐ Use a script until I'm comfortable

☐ Track activity (not outcomes) to stay motivated

☐ \_\_\_\_\_ Other:

\_\_\_\_\_

\_\_\_\_\_

## Part 6: Prospecting Metrics Dashboard

Track your activity and results weekly.

### Week 1 Metrics

Metric	Target	Actual	Notes
Prospecting Calls	_____	_____	_____
Emails Sent	_____	_____	_____
LinkedIn Connections	_____	_____	_____
Conversations	_____	_____	_____
Discovery Meetings Scheduled	_____	_____	_____
Qualified Opportunities	_____	_____	_____

**Contact Rate:** Conversations ÷ Total Outreach = \_\_\_\_\_%

**Qualification Rate:** Qualified Opportunities ÷ Conversations = \_\_\_\_\_%

\_\_\_\_\_



## Week 2 Metrics

Metric	Target	Actual	Notes
Prospecting Calls	_____	_____	_____
Emails Sent	_____	_____	_____
LinkedIn Connections	_____	_____	_____
Conversations	_____	_____	_____
Discovery Meetings Scheduled	_____	_____	_____
Qualified Opportunities	_____	_____	_____

**Contact Rate:** \_\_\_\_\_% **Qualification Rate:** \_\_\_\_\_%

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## Week 3 Metrics

Metric	Target	Actual	Notes
Prospecting Calls	_____	_____	_____
Emails Sent	_____	_____	_____
LinkedIn Connections	_____	_____	_____
Conversations	_____	_____	_____
Discovery Meetings Scheduled	_____	_____	_____
Qualified Opportunities	_____	_____	_____

**Contact Rate:** \_\_\_\_\_% **Qualification Rate:** \_\_\_\_\_%

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# Week 4 Metrics

Metric	Target	Actual	Notes
Prospecting Calls	_____	_____	_____
Emails Sent	_____	_____	_____
LinkedIn Connections	_____	_____	_____
Conversations	_____	_____	_____
Discovery Meetings Scheduled	_____	_____	_____
Qualified Opportunities	_____	_____	_____

Contact Rate: \_\_\_\_\_% Qualification Rate: \_\_\_\_\_%

# Part 7: Weekly Optimization Review

At the end of each week, answer these questions:

## Week 1 Review

Did I hit my activity targets? ☐ Yes ☐ No

Which channel produced the most conversations?

\_\_\_\_\_

What messaging resonated best?

\_\_\_\_\_

What objections did I hear most?

\_\_\_\_\_

What will I do differently next week?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Week 2 Review

Did I hit my activity targets? ☐ Yes ☐ No

Which channel produced the most conversations?

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What messaging resonated best?

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What objections did I hear most?

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What will I do differently next week?

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## Week 3 Review

Did I hit my activity targets? ☐ Yes ☐ No

Which channel produced the most conversations?

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What messaging resonated best?

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What objections did I hear most?

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What will I do differently next week?

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## Week 4 Review

Did I hit my activity targets? ☐ Yes ☐ No

Which channel produced the most conversations?

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What messaging resonated best?

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What objections did I hear most?  
\_\_\_\_\_

What will I continue doing next month?  
\_\_\_\_\_  
\_\_\_\_\_

## Part 8: Accountability & Commitment

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Make your prospecting plan real by committing publicly and building accountability.

### My Commitment

I commit to completing \_\_\_\_\_ prospecting contacts per day for the next 30 days.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Accountability System

Who will hold me accountable?  
\_\_\_\_\_

How often will we check in?  
\_\_\_\_\_

What's my consequence for missing targets?  
\_\_\_\_\_  
\_\_\_\_\_

What's my reward for hitting targets?  
\_\_\_\_\_  
\_\_\_\_\_

### Daily Tracking

I will track my prospecting activity using:

- ☐ CRM system
- ☐ Spreadsheet
- ☐ Paper log

☐ Mobile app: \_\_\_\_\_

☐ Other: \_\_\_\_\_

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## Notes & Insights

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*Complete this worksheet and begin your 30-day prospecting plan immediately. Review progress weekly with your trainer.*