

Module 4: Prospecting & Lead Generation - Action Worksheet

Name: __ Date: __

Part 1: Prospecting Plan

Daily Prospecting Goals: - Calls to make: _ - Emails to send: - *Social touches:* __ - Referrals to request: _____

Part 2: Prospecting Channels

Rank your top 5 prospecting channels: 1. ____ 2. ____ 3. ____ 4. ____ 5. _____

Part 3: 30-Before-30 Challenge

Commit to 30 prospecting touches before 11:30 AM daily.

Week 1 Tracking: | Day | Touches | Results | |----|-----|-----| | Mon | _ | // **Tue** / | _ | |
Wed | / | | Thu | _ | // **Fri** / _ | _____ |

Part 4: Referral Strategy

Top 10 referral sources: 1. _____ (Last contact: _) 2. ____ (Last contact: _) 3. ____ (Last contact: _) 4. ____ (Last contact: _) 5. ____ (Last contact: _____)

Commitment: I will prospect daily without fail.

Signature: __ Date: __