

Module 4: Prospecting & Lead Generation

Action Worksheet

Name: _____ Date: _____

Part 1: Prospecting Math

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: _____ \div Close rate (____%) = _____ qualified opportunities needed

Qualified opportunities needed: _____ \div Qualification rate (%) = _____ conversations needed

Conversations needed: _____ \div Contact rate (%) = _____ total prospecting contacts needed per month

Daily prospecting contacts required: _____ \div 20 working days = _____ per day

Part 2: 30-Day Prospecting Plan

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

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

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

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

Part 3: Multi-Channel Strategy

Design your approach for each prospecting channel.

Phone Prospecting

Best times to call my prospects:

My opening statement:

My value proposition (one sentence):

My call-to-action:

Voicemail script:

Email Prospecting

Email Template #1: Initial Outreach

Subject

Line:

Body:

Call-to-Action:

Email Template #2: Follow-Up

Subject

Line:

Body:

Call-to-Action:

LinkedIn Strategy

My LinkedIn profile headline:

Connection request message:

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

Referral Strategy

My referral request script:

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

Part 4: Ideal Prospect Profile

Define your ideal prospect to focus your prospecting efforts.

Demographics

Industry/Type:

Geographic

Location:

Deal **Size/Volume:**

Experience **Level:**

Property **Types:**

Psychographics

Their **Goals:**

Their **Challenges:**

Their **Values:**

Decision-Making **Style:**

Where to Find Them

Online:

LinkedIn groups:

Facebook groups:

Real estate forums:

Other:

Offline:

- Real estate investor meetups
 - Chamber of Commerce events
 - Industry conferences
 - Networking groups (BNI, etc.)
 - Other: _____
-

Part 5: Overcoming Call Reluctance

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:
_____	_____	_____

Trigger	#2	Reframe:
_____	_____	_____

Trigger	#3	Reframe:
_____	_____	_____

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: _____%

Week 3 Metrics

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

Contact Rate: _____% Qualification Rate: _____%

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?

What messaging resonated best?

What objections did I hear most?

What will I do differently next week?

Week 3 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 4 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 continue doing next month?

Part 8: Accountability & Commitment

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: _____

Notes & Insights

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