



NEW ERA BUSINESS PLAN WORKSHEET

Current Level

Next Promotion Level

Current Production

Promotion Requirements

Goals for the number of new associates _____, sales _____, points, _____, income _____ each month.

Time/Resources you are willing to commit:

_____ Number of evenings/hours per week

_____ Number of Corporate Overview invitations per week

_____ Number of Corporate Overview guests per week

_____ Number of Follow-Up Interviews per week

_____ Number of new associates per week

_____ Number of personal financial review presentations per week

_____ Number of new clients per week

Deadline to achieve your goals: _____