COMMONWEALTH financial network®


# The 20-Point System Template

Are you engaging in revenue-generating activities as much as you should be?

As you grow your business and spend more and more time supporting your client base, it's easy to stop doing the activities that made you a successful financial advisor in the first place. With the 20-Point System, you can easily refocus your efforts on the high-impact activities that are more likely to generate business for you and hold yourself accountable for earning 20 points each week.

This sample spreadsheet is offered as a starting point. Determining what your own revenue-generating activities are is the first step in developing a personalized system that allocates your time and energy toward profitable actions.

**Week of:**

**Point goal:** 20

**Total points earned:** 0

| Activity | Point Value | Mon | Tue | Wed | Thu | Fri |
|---|---|---|---|---|---|---|
| ***Referrals:*** | | | | | | |
| Ask for an introduction | 1 | | | | | |
| Ask for an introduction and get one | 2 | | | | | |
| Ask for an introduction, get one, and set up a meeting | 3 | | | | | |
| Send a handwritten thank-you card to a referrer | 1 | | | | | |
| Send a gift to a client who has made 5+ referrals | 3 | | | | | |
| Other | | | | | | |
| ***Networking:*** | | | | | | |
| Give a business card to a stranger | 1 | | | | | |
| Attend a Rotary meeting or Chamber of Commerce event | 4 | | | | | |
| Other | | | | | | |
| ***Strategic Alliances:*** | | | | | | |
| Meet with a potential strategic alliance | 3 | | | | | |
| Meet with an existing strategic alliance | 4 | | | | | |
| Refer a client to a strategic alliance | 1 | | | | | |
| Work with a strategic alliance on a mutual client's issue | 3 | | | | | |
| Attend a BNI meeting | 2 | | | | | |
| Other | | | | | | |

| Activity | Point Value | Mon | Tue | Wed | Thu | Fri |
|---|---|---|---|---|---|---|
| ***Sales:*** | | | | | | |
| Complete a sale | 3 | | | | | |
| Complete a sale that generates annual revenues of $5,000+ | 5 | | | | | |
| Other | | | | | | |
| ***Client Meetings:*** | | | | | | |
| Conduct a face-to-face meeting with an A client | 4 | | | | | |
| Conduct a face-to-face meeting with a B client | 3 | | | | | |
| Conduct a face-to-face meeting with a C client | 2 | | | | | |
| Other | | | | | | |
| ***Client Marketing:*** | | | | | | |
| Send a newsletter to 50 clients and prospects | 2 | | | | | |
| Send a direct mail letter to 20 prospects | 1 | | | | | |
| Send a market commentary to 50 clients and prospects | 2 | | | | | |
| Contact an A or B client about a timely topic | 1 | | | | | |
| Send a handwritten birthday card | 1 | | | | | |
| Host a client appreciation event | 10 | | | | | |
| Send a handwritten holiday card | 1 | | | | | |
| Send a client survey to 50 clients | 5 | | | | | |
| Other | | | | | | |
| ***Public Relations:*** | | | | | | |
| E-mail a story idea to a reporter | 1 | | | | | |
| Call a reporter to pitch an article | 3 | | | | | |
| Get published (circulation of 25,000 or less) | 5 | | | | | |
| Get published (circulation of 25,000 or more) | 10 | | | | | |
| Other | | | | | | |

| | Mon | Tue | Wed | Thu | Fri |
|---|---|---|---|---|---|
| **Total Points Earned Each Day:** | 0 | 0 | 0 | 0 | 0 |

# COMPLETE A HIGH-IMPACT ACTIVITY TODAY!

Contact Commonwealth to see how a change of broker/dealer–RIA can be one of the most rewarding actions you take. Call Andrew Daniels, managing principal, business development, or a member of the Field Development team at 866.462.3638, or send an e-mail to adaniels@commonwealth.com. Visit www.commonwealth.com to learn more.

COMMONWEALTH *financial network*®

Founded in 1979, Commonwealth Financial Network, member FINRA/SIPC, is the nation's largest privately held independent broker/dealer–RIA, with headquarters in Waltham, Massachusetts, and San Diego, California. The firm supports more than 1,650 independent advisors nationwide in serving their clients as registered representatives, investment adviser representatives, and registered investment advisers, as well as through hybrid service models.

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