

“From the Trenches Coaching E-Mail”

Date: January 1, 2024

From: Dennis Tubbergen

Note: You are receiving this “From the Trenches” coaching e-mail because you requested information from my company “Rocket Production Systems” sometime in the recent past. You may remember the “Business Blueprint” book revealing how I produce \$20 million in annuity premium each year while working with clients just 10 hours each week.

“Why Advisors Fail to Reach Their Income Goals”

Here we are.

On a level playing field.

All of us.

A New Year has dawned, a fresh slate has emerged.

You have 366 days (yep, 2024 is a leap year) to reach your income goals.

That’s 8,784 hours; 527,040 minutes; and 31,622,400 seconds.

No matter where you are financially speaking at the beginning of 2024, where you end the year financially will be a direct result of how you choose to spend your time, the most precious of all resources.

While many of us are diligent, even fanatical about keeping our health to allow for us to have more productive time, the bottom line is this, it’s an extremely finite resource that requires extreme judiciousness when spending it.

If you haven’t clearly defined your income goals for 2024, STOP and take a planning day to figure out what you need to do on a monthly, weekly, and daily basis to achieve your desired income level.

Let me give you a glimpse into my planning for 2024.

My financial advisory practice will generate 5 new clients per month for me through my marketing efforts and 4 new clients per month for another advisor that I am adding to my office. This will allow me to cover my marketing expenses and overhead and put \$200,000 per month to the bottom line.

I have similar, detailed, precise planning that I have done for my other companies. These plans are quantified by number of clients, number of leads required, lead generation methods, and staff required.

On a monthly basis, I know exactly what I need to do to market these businesses and when that marketing needs to be completed.

Will my detailed planning lead to the results that I WILL achieve exactly as I’ve laid it out?

Sure would be nice, but to date, after many, many years of reaching my income goals, it's never happened.

Here's the first eternal success truth:

Success is never achieved in a straight line.

There's an old Russian proverb that states, "Man plans and God laughs".

Lots of truth there.

After you've laid out your plan for the year, that plan needs to be reviewed on a monthly basis.

You need to measure cost per lead, conversion percentage, and evaluate your marketing tests.

Then, you need to adapt.

My New Retirement Rules class, which is now the leading marketing method that I use in my business, was originally a split test against a traditional, dinner seminar.

While the dinner seminar was effective, the New Retirement Rules class literally blew it away, allowing me to get more than 60% of my class attendees as revenue generating clients.

It would be easy for me to do only the New Retirement Rules class as my sole client acquisition method, but that would be incredibly stupid.

The worst number in business is one as Dan Kennedy says.

If you have only one way to get new clients, there WILL be a day that you are out of business as that marketing method eventually loses effectiveness.

I would not be surprised to see the political powers that be, once again close down the economy and ban group gatherings. Because of that very real possibility, I am continuing to test and use other client acquisition methods that will continue to work to attract clients to my business should this unfortunate history repeat itself.

Here's the second success truth for this week.

Most fail by surrender, not circumstances.

My advice to you as we begin this New Year?

Plan, adapt, and never surrender.

In 2024, I have already scheduled New Retirement Rules classes in February (now close to members), March (commitment needed this week), April, May, June, July, August, September, October, and November. While my cost per class attendee will likely vary significantly throughout the year, because I use the Revenue Sourcing™ planning system with every prospective client, my return on investment will be exceptional.

If you want to make 2024 a banner year, internalize the Revenue Sourcing™ planning system and invest in yourself by participating in the New Retirement Rules class marketing programs.

Reminder for Revenue Sourcing™ licensees: we have a coaching call every Monday. (Sorry, these calls are for Revenue Sourcing™ licensees only. If you'd like to learn more, call the office, 1-866-921-3613)

Date	Call Topic
January 8	How to use the Social Security Maximization Report to Acquire New Clients
January 15	Goal Achievement Keys
January 22	Drawdown and the Oldest Sales Formula
January 29	Celebrity Advisor Strategies
February 5	Using IRA Tax Analysis to Acquire Clients
February 12	Lead generation secrets
February 19	Income mapping as a client attractant
February 26	One to many selling secrets

Note: If you are not receiving these emails each week, please notify your Advisor Success Concierge, Becca Devries.