

# Practice Development Series

## Module 8: Fine Tuning / Activity 2 – Review your Business and Marketing Results

Aligned with the PFA™ Designation Program

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### Activity 8.2, Section 1 Review your Business and Marketing Results

**Instructions:** Reflect on your business results from the last 12 months. What were the successes for your financial advisory practice? Where can you make improvements? The categories and questions below will help you identify areas of weakness and possible strategies for improvement. Discuss these with your sales manager or a trusted colleague.



## **Activities**

### **Target Market:**

1. Have you clearly identified a target market? Y/N
2. Describe your target market
  
3. What percentage of new clients engaged during this period were from this target market?
  
4. What can you do going forward to improve your focus on this target market?

### **Activity Action Plan:**

1. *Client Contacts*
  - a. What was your goal for the period? \_\_\_\_\_
  - b. What was your result for the period? \_\_\_\_\_
  - c. Did you achieve your goal? Yes No  
i. If not was your goal realistic? Yes No  
ii. Should the goal be modified? Yes No  
iii. Did you apply sufficient effort/focus to this goal? Yes No
  - d. What can you do over the next period to improve the result?



2. *Introductory Appointments*

- a. What was your goal for the period? \_\_\_\_\_
- b. What was your result for the period? \_\_\_\_\_
- c. Did you achieve your goal? Yes    No
  - i. If not was your goal realistic? Yes    No
  - ii. Should the goal be modified? Yes    No
  - iii. Did you apply sufficient effort/focus to this goal? Yes    No
- d. What can you do over the next period to improve the result?

3. *Discovery Meetings*

- a. What was your goal for the period? \_\_\_\_\_
- b. What was your result for the period? \_\_\_\_\_
- c. Did you achieve your goal? Yes    No
  - i. If not was your goal realistic? Yes    No
  - ii. Should the goal be modified? Yes    No
  - iii. Did you apply sufficient effort/focus to this goal? Yes    No
- d. What can you do over the next period to improve the result?

4. *Presenting Recommendations*

- a. What was your goal for the period? \_\_\_\_\_
- b. What was your result for the period? \_\_\_\_\_
- c. Did you achieve your goal? Yes    No
  - i. If not was your goal realistic? Yes    No
  - ii. Should the goal be modified? Yes    No
  - iii. Did you apply sufficient effort/focus to this goal? Yes    No



d. What can you do over the next period to improve the result?

*5. Referrals Received*

a. What was your goal for the period? \_\_\_\_\_

b. What was your result for the period? \_\_\_\_\_

c. Did you achieve your goal? Yes No

i. If not was your goal realistic? Yes No

ii. Should the goal be modified? Yes No

iii. Did you apply sufficient effort/focus to this goal? Yes No

d. What can you do over the next period to improve the result?

*6. Establishing Centre of Influences (COI)*

a. What was your goal for establishing new COIs during the period? \_\_\_\_\_

b. What was your result for the period? \_\_\_\_\_

c. Did you achieve your goal? Yes No

i. If not was your goal realistic? Yes No

ii. Should the goal be modified? Yes No

iii. Did you apply sufficient effort/focus to this goal? Yes No

d. What can you do over the next period to improve the result?



7. *Centre of Influence Meetings*

- a. What was your goal for meeting with each COI during the period? \_\_\_\_\_
- b. What was your result for the period? \_\_\_\_\_
- c. Did you achieve your goal? 

Yes	No
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  - i. If not was your goal realistic? 

Yes	No
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  - ii. Should the goal be modified? 

Yes	No
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  - iii. Did you apply sufficient effort/focus to this goal? 

Yes	No
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- d. What can you do over the next period to improve the result?

8. *Networking Events*

- a. What was your goal for the period? \_\_\_\_\_
- b. What was your result for the period? \_\_\_\_\_
- c. Did you achieve your goal? 

Yes	No
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  - i. If not was your goal realistic? 

Yes	No
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  - ii. Should the goal be modified? 

Yes	No
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  - iii. Did you apply sufficient effort/focus to this goal? 

Yes	No
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- d. What can you do over the next period to improve the result?

