

# Practice Development Series

## Module 1: Business Planning / Activity 5: Activity Action Plan

Aligned with the PFA™ Designation Program

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**Instructions:** Using the **Key Activities** list from Module 1, Business Planning, develop an activity action plan to grow your client base and generate income. Use the template that follows to input a minimum of 5-7 activities into your daily, weekly or monthly schedule. Include a weekly action item to assess whether you accomplished what you set out to do. Scroll down to ensure you see the full template.

| Business Plan – Activity Action Plan |           |      |                           |
|--------------------------------------|-----------|------|---------------------------|
| Activities                           | Frequency | Goal | (Results) – Weekly Review |
| Client Contacts                      | Daily     |      |                           |
| Introductory Appointments            | Weekly    |      |                           |
| Discovery Interviews                 | Weekly    |      |                           |
| Present Recommendations              | Weekly    |      |                           |
| Referrals Received                   | Weekly    |      |                           |



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## Module 1: Business Planning / Activity 1.5: Activity Action Plan

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| Business Plan – Activity Action Plan |           |      |                           |
|--------------------------------------|-----------|------|---------------------------|
| Activities                           | Frequency | Goal | (Results) – Weekly Review |
| Review Business Plan                 | Quarterly |      |                           |
| 1.                                   |           |      |                           |
| 2.                                   |           |      |                           |
| 3.                                   |           |      |                           |
| 4.                                   |           |      |                           |

