

30 Day Outreach Plan

50 % contact; 20% meeting rate; 3-5% close rate

Same day Receive lead: Call (VM), email & text*	1 Call in either AM or PM (opposite of day 1) & text	2	3 Call & email	4	5 Call & text	6
7	8 Call & email	9	10 Call & text	11	12 Call & email	13
14	15 Call	16	17 Call & email	18	19 Call & text	20
21 Call, text & email	22 Text	23	24 Call & email	25	26 Call & email	27 Text
28	29 Call & email	30	Drip with 1-2 touches per month			

*If you cannot use texting then replace that step with an email

All goals are estimates based on the average advisor using SmartAsset. This plan is for reference only and does not guarantee that you will be successful on the platform.