

Checklist: Agent Planning Mistakes

- Yearly goals only – that’s only a small part of a plan.
- No relationship of daily/weekly activities to monthly or yearly goals.
- No cohesive campaign to impact each target market. (Theme needs to pervade campaign.)
- Relying on re-active lead generating methods to grow business.
- One promotional piece sent once to thousands of strangers.
- No target markets defined.
- No budget attached to specific markets.
- No measurement of marketing tactics.
- Wrong target markets chosen (best – past clients)
- No dates for completion of tactics.
- Too few impacts on target markets (twelve minimum needed a year to penetrate market).
- No overall budget.
- Competition not defined or respected (plan not strong enough to take market share from competition).
- Plan not consistent with particular individual’s business (all pizza parlors don’t use the same plan).
- Little analysis done - prior to setting objectives and deciding on actions.
- Individual doesn’t thoroughly define his “position” in the marketplace prior to creating promotions.
- Activities not delegated properly.
- No systems in place to carry out plan.
- No lead generating plan.
- No placement of lead generating plan in daily activity schedule.
- Marketing tactics quit before pay-off (consistency and frequency always wins).
- No professional development planned to master the skills to be competitive.

Excerpted from Beyond the Basics of Business Planning , Carla Cross Seminars, Inc. Available for purchase at www.carlacross.com.

