

Building Your Individual Donor Base

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Your progress toward success begins with a fundamental question: Where are you going?

Definiteness of purpose is the starting point of all achievement, and its lack is the stumbling block for ninety-eight out of every hundred people simply because they never really **define their goals and start toward them.**

Study every person you can think of who has achieved lasting success, and you will find that each one has had a definite major **purpose**. Each had a plan for reaching that goal, and each devoted the greatest part of his or her thoughts and efforts to that end.

Chapter 1, page 1 from Napoleon Hill's
book - Napoleon Hill's Keys to Success

WHAT IS MISSION CRITICAL IN YOUR ORGANIZATION?

- **WHAT IS YOUR DESIRED OUTCOME**
- **WHAT ARE YOUR DRIVERS TO GET THERE**
- **WHAT DO YOU NEED**

Fulfillment

Mission

Purpose

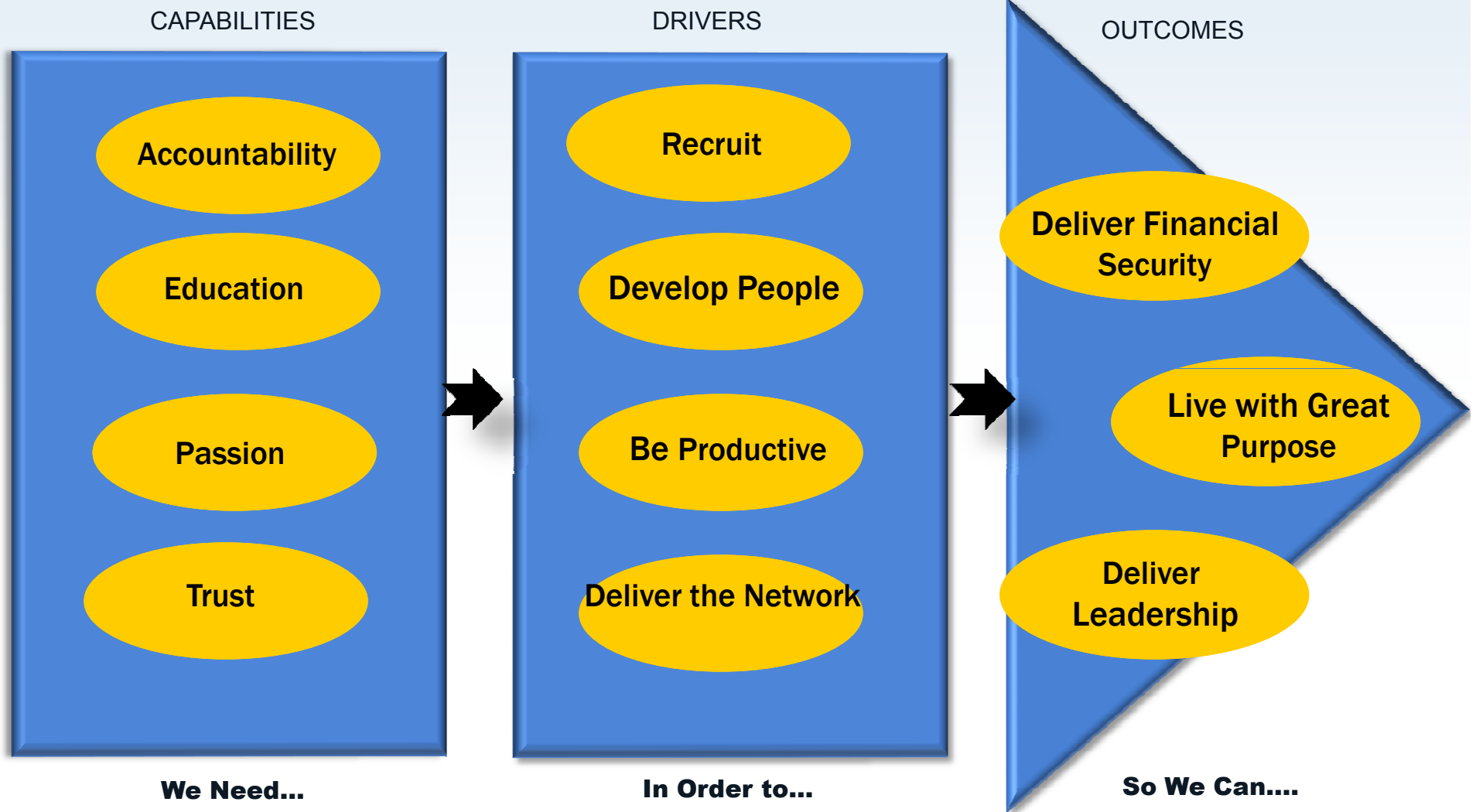
Success

Job

Career



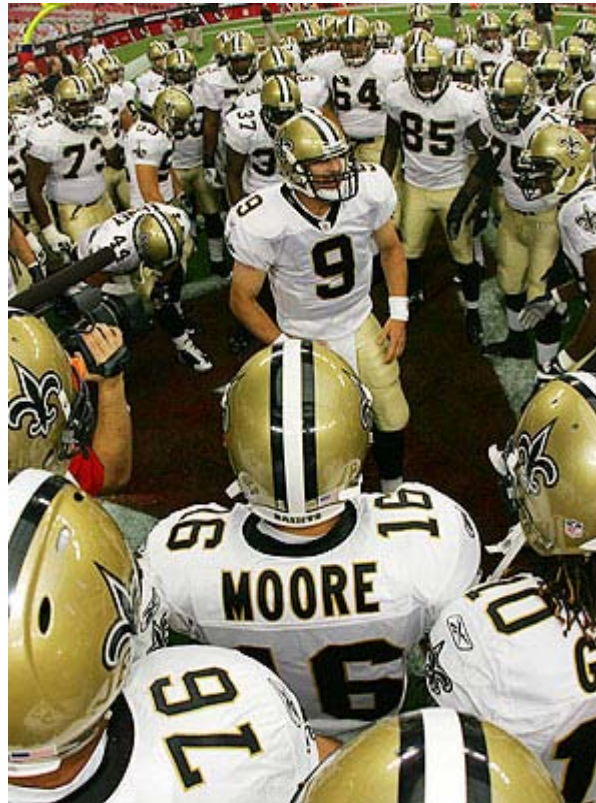
Securing Financial Futures Today



Creating a Culture of Excellence

THINK LIKE A CHAMPION

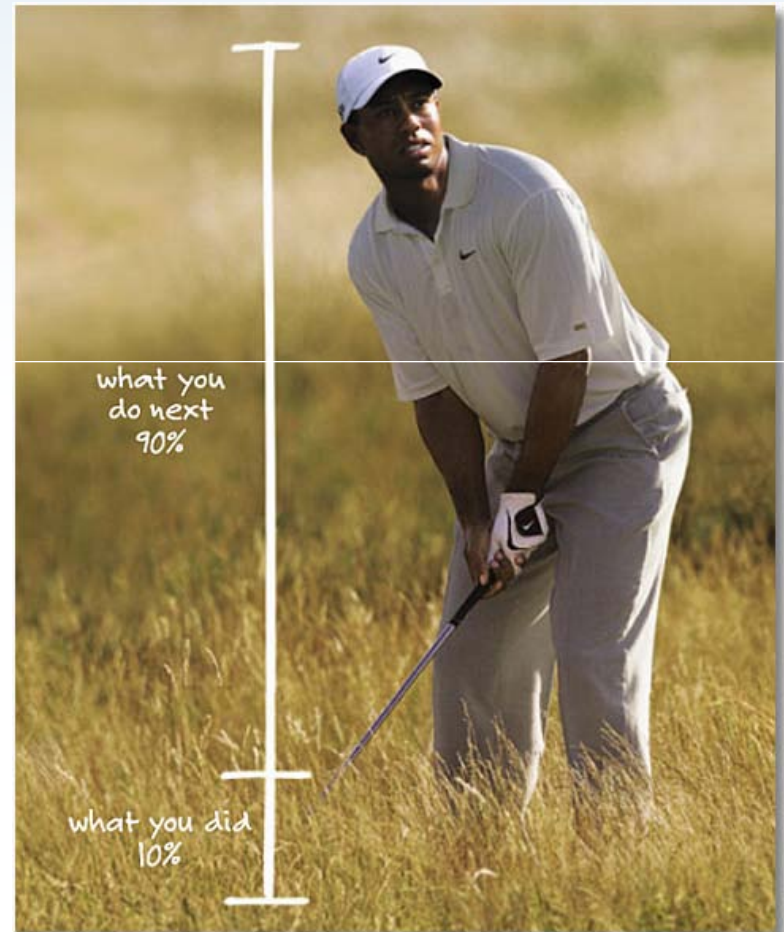
- **FOCUS ON SUCCESS**



90% Feed Forward, 10% Feedback

The primary positive emotional power to influence and change is **“From now forward...”**

The brain can briefly and intently learn from the past but it easily becomes trapped there, distracted, defensive, and far less capable of **building best forward progress**



How is OUR Business like YOUR Business?

- National Brand, Local Ownership
- People Business
- Non-Demand Product
- Constant Prospecting
- Activity

National Brand, Local Ownership

- Leverage your National Brand, it is bigger and better than you
- Get involved in the Community yourself and
- See and be seen
- Be a lot of places at a lot of times
- Share the Impact You are Making in the Community
JDRF
- Be Prepared, you never know when the right opportunity comes around and if you are not prepared, it is too late
- Competition

We are in the People Business

- **Mission, Vision, Values**

Know it, Share it, Live it

- **People don't care how much you know until they know how much you care**
 - **Talk to them about their needs, goals, desires first**
- **B to B Conversations**
- **Current Clients vs New Relationships**

We are in a Non-Demand Business

- **Definition of Sales**
 - Influencing people to take action on something want to do or need to do
- **OPPORTUNITY IS NOWHERE**
- **We need to find the Demand**

It is all about the activity

- **10 3 1**
- **3 per day**
- **Set phone time**
- **Post and Plan daily**
- **Review Weekly**
- **Analyzed and Be Accountable Monthly**

June - Work Plan and Results

Case File #				
Date	Name	Assoc. #	Time Log	Type/Code
2	S. Dault	1		F
9	M. Dunge	2		F
10	K. Dault	2		F
13	B. Stinson	1		F
16	T. Dutton	1		F
17	K. Thwait	1		F
20	K. Thwait	1		F
21	W. Mason	1		F
22	S. Wood	1		F
24	E. Green	1		F
24	R. Lasker	1		F
28	M. Bickel	1		F
28	D. Williams	1		F
29	D. Bunker	1		F

Business Description of Activity					
Date	Name	Category	Amount	Type	Amplified FYC
16	T. Dutton			DR	
16	T. Dutton			DR	
16	T. Dutton			DR	
21	K. Thwait			DR	
21	K. Thwait			DR	

Rec'd In Force					
13	E. Johnson				
16	J. M. Smith				
16	L. M. Smith				
17	K. M. Smith				
22	S. Wood				
22	S. Wood				
22	E. Green				
23	R. Lasker				
23	C. M. Smith				
23	C. M. Smith				
24	R. Lasker				
24	R. Lasker				
24	R. Lasker				

Account Efficiency Points														
Date	Accts. Made	Accts. Reop.	Pricing for Appoint-ments			Accts. New Starts	Meals		Qualified Substitu-tion	New Individuals	Cases Closed	Cosult. Interviews	Pv. It.	
			Dial'd	Reached	A. P.C.E.		Name	Res. It.						
1	2	0	30	6	4	0	Steve	"	31	0	0	0	16.5	
2	3	0	15	4	3	0	Shirley	"	0	0	0	1	2	
3	2	0	0	0	0	0	OG	"	0	0	0	0	0	
4	1	1	5					"	31	0	0	0		
5	5	4	45	10	8	0	2	"	31	0	0	1	8.5	
6	3	3	45	11	5	0	X	"	5	2	0	0	6.8	
7	3	0	40	14	4	3	X	"	0	0	0	0	0	
8	0	0	20	5	0	3	Daniel	"	0	0	0	0	0	
9	5	4	15	5	2	0	Richard	III	0	1	1	1	11.5	
10	9	6	5	1	0	5	John 1	III	5	4	3	1	11.5	
11	20	13	125	31	19	9	2	"	11	7	6	2	22.5	
12	3	1	7	20	40	27	9	4	"	42	7	6	3	41
13	5	3	26	8	3	1	Book 2	"	4	1	1	1	6	
14	3	3	16	4	3	0	Paul Perry	"	8	0	0	0	6	
15	4	4	20	5	3	2	X	"	14	1	1	1	10	
16	1	0	10	3	0	0	wolf	"	0	0	0	0	0	
17	4	3	35	7	2	1	Bonnie	III	5	1	1	1	6.5	
18	17	13	97	27	16	4	4	"	34	3	3	3	28.5	
19	42	30	277	73	43	5	2	"	73	10	9	6	59.5	
20	1	1	15	6	2	0	X	"	1	0	0	1	1.5	
21	4	3	20	6	1	0	Wesley 2	III	5	1	0	1	11	
22	5	3	20	5	2	0	X	"	0	0	0	3	3	
23	3	2	25	8	5	1	Wesley 1	III	0	0	0	0	1	
24	3	1	20	4	0	0	OG	"	3	0	0	1	1	
25	16	10	100	24	16	1	2	"	35	1	0	6	38.5	
26	14	40	371	12	59	11	10	"	18	11	9	12	96.5	
27	3	1	30	9	4	0	John 2	"	0	0	1	0	2	
28	4	3	15	7	2	1	Myra 1	"	3	0	0	2	5.5	
29	3	2	0	0	0	0	Don/Dee 1	"	6	0	0	1	6	
30	2	2	20	6	2	0	"	"	0	2	1	0	3	
31	16	8	111	15	7	5	4	"	9	2	2	3	16.5	
76	42						14	41	117	13	11	15	113	

Agent's Year 2010-2011

FINANCIAL HEALTH AND SECURITY ADVISORS, PLLC Our mission is to foster lifelong relationships through trust, hard work and continuing education while maintaining a firm commitment to our family and faith.

Monthly Client Builder Record

Personal Activity

	Appointments			The Network/Opportunity			Telephoning			From All Activity						Business Submitted		Core Business Paid-For			
	Days Worked	Made	Kept	Gross RMBIS	3658 Commission	Premium DEULTMREY	Dials	Rechs.	Acpt. Made	Bus. Leads	QB	New FPs	Open	Close	Total Points	Lives	Premium	Lives	New Client	FYCs	Premium
GOAL	16.3	121	32.6	\$ 3,000.00	\$ 200.00	\$ 15,000.00	260	50	40	8	80	20	40	40	140.0			63.50%	FORUM		\$ 444,032.00
June	19	32	47	\$ 129.62	\$ -	\$ (14,408.00)	151	67	30	8	24	11	38	29	150.0	13.85	\$ 35,354.00	4.20	7.50	\$ 12,735.00	\$ 27,605.00
AVE QRT 2	18.3	59.7	42.0	\$ 1,120.36	\$ -	\$ (9,599.33)	173.0	53.7	27.7	6.0	82.0	9.3	31.8	35.0	122.7	19.23	\$ 32,326.67	14.03	6.17	\$ 16,937.00	\$ 34,797.53
July	16	31	56	\$ 579.65	\$ -	\$ (1,201.00)	164	70	31	8	21	21	24	25	81.5	18.75	\$ 39,980.00	13.25	9.00	\$ 12,375.00	\$ 26,605.00
AVE	20	103	86	\$ 225.24	\$ -	\$ (2,124.00)	138	46	22	8	56	14	27	32	110.0	24.11	\$ 44,685.00	19.85	7.75	\$ 6,121.00	\$ 22,545.00
Sept	18	39	63	\$ 677.40	\$ -	\$ (2,024.00)	109	39	22	3	26	12	29	35	107.0	19.30	\$ 43,257.00	23.00	9.00	\$ 26,905.00	\$ 46,601.00
AVE QRT 3	16.0	82.3	61.7	\$ 627.43	\$ -	\$ (1,883.00)	136.7	61.7	25.0	7.7	41.7	13.7	26.7	32.0	102.8	20.22	\$ 42,637.67	19.13	8.58	\$ 18,001.00	\$ 35,712.67
Oct	15	33	55	\$ 1,572.40	\$ -	\$ 621.00	83	28	16	3	32	13	32	31	56.0	11.35	\$ 29,477.00	12.55	4.40	\$ 18,613.00	\$ 39,814.00
Nov	20	34	34	\$ 132.05	\$ -	\$ -173.00	239	82	28	13	40	11	36	35	110.0	20.55	\$ 25,519.00	10.05	8.80	\$ 14,436.00	\$ 27,666.00
Dec	15	68	47	\$ 1,173.71	\$ -	\$ (3,753.00)	74	21	7	3	27	5	18	26	81.0	26.10	\$ 62,693.00	25.30	4.25	\$ 18,816.00	\$ 58,259.00
AVE QRT 4	15.7	80.3	55.3	\$ 869.39	\$ -	\$ (657.00)	123.7	40.7	17.7	7.0	31.0	9.7	28.0	31.7	89.8	20.07	\$ 38,559.67	18.87	5.18	\$ 18,955.67	\$ 41,810.67
Jan	18	50	54	\$ 1,254.23	\$ 30.59	\$ (9,792.00)	100	41	23	12	88	8	33	38	125.0	19.40	\$ 62,008.00	13.85	4.10	\$ 17,856.00	\$ 45,210.00
Feb															0.0						
March															0.0						
AVE QRT 1	18.0	90.0	64.0	\$ 1,084.23	\$ 30.59	\$ (9,792.00)	109.0	41.0	23.0	12.0	88.0	8.0	33.0	39.0	135.0	19.40	\$ 62,009.00	13.85	4.10	\$ 17,856.00	\$ 45,910.00
April															0.0						
May															0.0						
GOAL	16.3	121	32.6	\$ 3,000.00	\$ 200.00	\$ 15,000.00	260	50	40	8	80	20	40	40	140.0		\$ 60,000.00	34.00	7.00	\$ 23,300.00	\$ 48,030.00
TOTAL	130	670	462	\$ 5,873.30	\$ 30.62	\$ (31,569.30)	1011	373	183	64	428	95	229	269	871.0	19.40	\$ 346,583.30	131.45	52.87	\$ 135,484.00	\$ 304,175.00
% Dev	155.2%	57.0%	73.6%	21.9%	15.3%	79.5%	39.3%	51.2%	162.0%	88.0%	51.4%	21.8%	34.7%	35.1%	27.6%	71.8%	59.5%	81.2%	72.3%	77.8%	77.8%
YTD AVE	17.30	59.70	57.79	\$ 448.88	\$ 30.57	\$ (3,279.00)	130.13	43.80	22.00	7.00	33.90	11.35	28.33	35.89	109.00	19.70	\$ 45,153.00	15.43	6.91	\$ 18,179.00	\$ 30,021.00

The values we will not compromise across the five pillars of our practice:

1. **Hard Work** - at the top of our responsibilities.
2. **Long Term Relationships** - those who are loyal to us are our most valuable and usually best clients.
3. **Family First** - the support and encouragement that goes into our work.
4. **Integrity** - We established this as our hallmark and it remains to be cherished and followed.
5. **Education** - We invest in our team to ensure growth. Without growth, we are not serving our clients fully.

Score Card	Growth	Milestones
Court of the Table	4 CLU Tests Completed	\$450K Gross Revenue
FORUM Qualifying Member	Series 7 and 65	75 DI Lives and \$160K of DI Premium
Lives Leader - SWFG, and West	Obtain Model II	\$100,000,000 of Face Amount
Rep. of the Year - SWFC		33+ QI
TOP 10 Premium - WEST		



CELEBRATE THE WINS