5/30 grid
Systems, the magic to success within any successful company

Workbook #1
The Golden Triangle

Area 1: Marketing
More & Better Leads

Area 2: Pre-Sales
Move leads to conversion

Area 3: The Sale
The "Yes" or the "No"

Area 4: Servicing
Turn our servicing into a profit center

Identify Targets 1

Track 100% of leads 3

Implement 10+ Strategic Strike 5

Improve pressure points 9

Ask key questions 4

Master "Present Solutions"
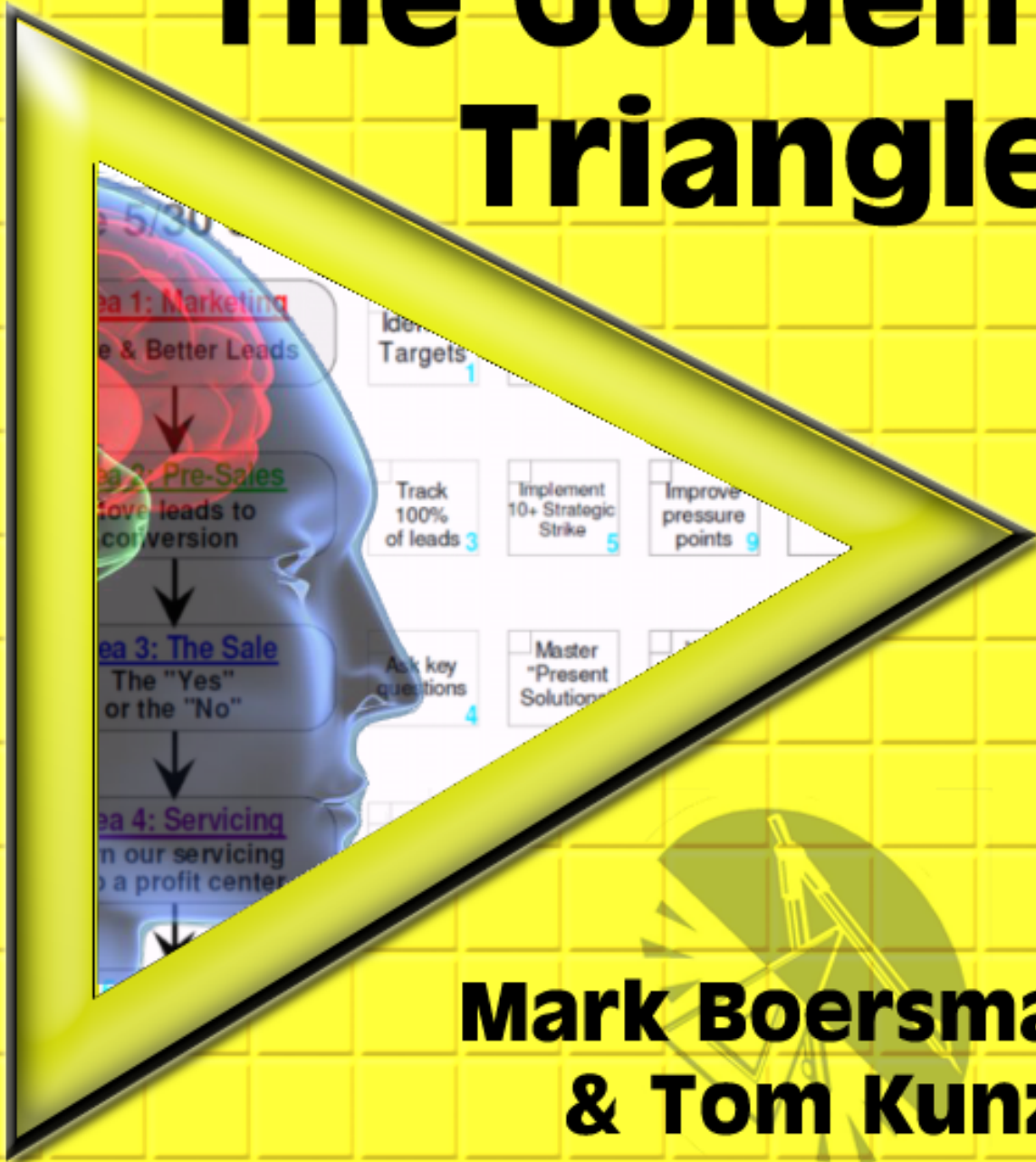
Mark Boersma
& Tom Kunz

"When I saw the 5/30 Grid the first time, I was amazed at how easy it was to understand and how it covered everything any business would need, anywhere in the world, at any level. The 5/30 Grid is the **DNA for Business** and will help any business become more successful as a result of having a powerful/profitable Business Operating System."

Tom Kunz - past President of CENTURY 21 Real Estate LLC.

"Being the owner of my own company and working with all types of businesses, I am always seeking tools, systems, and processes which will help businesses see greater success, **earn more money, work less hours, have less stress, and have greater life balance.** The 5/30 Grid does all that and a lot more! Every business on the planet can benefit from the 5/30 Grid."

David Thompson - Proforma

"As President of a company which builds million dollar conservatories all around the world, we have a very unique business. What I found interesting is that the 5/30 Grid has become not only the **instruction manual** for building my business but I share it with every other business owner I know. I understand that as I help others see greater success that I will also see greater success as well. Together we can accomplish so much more than we ever could on our own."

Alan Stein - Tanglewood Conservatories

"As a CPA I am a big systems guy. I have seen over the years how most business owners really end up owning a job not a company. The 5/30 Grid is a fun, exciting, and powerful way to build systems which will **clone you as a business owner.** Every business owner should be using the 5/30 Grid. Every mastermind group should use the 5/30 Grid as the foundation for working together. **Every employee will see greater success** as a result of understanding how their jobs/careers/ expertise fits into the 5/30 Grid."

Scott Allred - CPA - e-Accounting Solutions, Inc.

www.thevisionproject.net

Most Important Action Items

Version 3.20

We know, based on the the 80/20, 90/10, or the 97/3 principle that most likely 10% of this workbook will produce 90% of the result for you, over the next 90 days. When you produce more income/revenue/sales in less time and IF you invest those dollars back into the right areas within your business, **YOU WILL MAKE A LOT MORE MONEY and will work a lot less hours!**

As you go through this workbook, list below the most important action items and their due dates. Better yet, we recommend getting a hard bound journal where you actually list the following: - Link 001 -

==

- <u>Action To Take (Be Specific)</u>   - <u>Due Date</u>   - <u>Part Of The 5/30 Grid Applies To</u>
  - Why this action is so important to your success, the value of taking the action, and the cost to you, if you don't take the action, that you will incur but will never see a bill.
  - Upon completion, write how you were able to see the success, the benefits you will see in both the short and long term, and how great it feels to complete a part of the overall system which will help you to earn a lot more money working a lot less hours.
  FEEL THE SUCCESS!!!

==
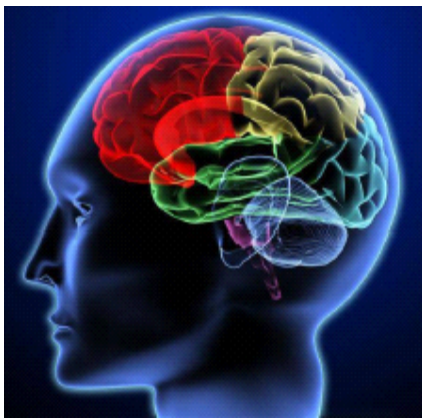
530 Grid + Personality Masteries

What does every successful business have in common?

Systems!

Personality Masteries + 5/30 Grid *for*

Individuals & Teams

"Reaching beyond our dreams and goals in every area of our life."
Career - Relational - Financial - Emotional - Personal

Printed Workbook vs. Online Workbook

There are a large number of additional resources available online to assist you with the implementation of all that you will learn in this powerful workbook. To access these resources go to:

http://TheVisionProject.net/GoldenTriangle.htm   Resources, tools, and systems for Golden Triangle

    NOTE: Every link throughout the workbook may be accessed through the above link.

www.TheVisionProject.net   Overall source for resources, tools, and systems.

http://TheVisionProject.net/OtherResources.html A lot of additional resources, tools, and systems.

To gain the maximum benefit obtain a printed workbook AND the eworkbook and use both together in helping you to take your business/life to the next level of success.

BIG PICTURE

Before we get started, let's take a look at the big picture for the different phases we will go through, not only in this workbook but the other workbooks which are a part of the 5/30 Grid + Personality Masteries + Natural Laws. How fast you go through each/all phases is totally up to you. Going through them faster is not better or worse as there are both advantages and disadvantages in either strategy. We will tend to go through each of these phases multiple times as we move to new dimensions of success throughout our lifetime.

Phase 1 - Get to know myself

Personality Masteries is designed to help us, first and foremost, learn why we do what we do. This is an ongoing process and more of a journey rather than a destination. - Link 002 -

Phase 2 - Discovery of my Life Vision

Once we learn "The reason we were put on this planet." we then have a context, a reason, why we go through everything we go through in our lives. This context helps us to quickly gain perspective, understanding and wisdom as to the reason for our PAST, our vision for the FUTURE, and the specifics of what we should be doing in the PRESENT. - Link 003 -

Phase 3 - Assessments

Once we discover our Life Vision we then better understand the big picture of where we will end up at the end of our life so we know the FUTURE, i.e. our destination. We then need to take a look at different types of assessments in various areas of our life, ask great questions and assess where we are, which gives us a point of reference. - Link 004 - simple/free assessments // - Link 005 - more comprehensive paid assessments.

Phase 4 - The Plan

In Phase 1, we learn about ourselves, in Phase 2, we discover our Life Vision, our destination, and in Phase 3 we learn about our current location. Phase 4 is taking a look at where we want to go (Phase 2), looking at where we are currently (Phase 3), and then mapping a path to get from Point "A" and move to Point "B" as soon as possible. - Link 006 -

NOTES

Phase 5 - Taking Action - Systems - BOS

Every car needs an engine and every business needs a BOS = Business Operating System. A BOS is a number of systems which all work together to help achieve the overall vision. If we do not know our vision, if we do not have a map to move from Point "A" to Point "B," we will either never get to Point "B" or it will take us far longer than we ever imagined it would take. What are the best actions I should be taking today to achieve my personal and professional short and long term goals? The 5/30 Grid is the DNA for the foundation of that plan and Personality Masteries is the DNA for understanding people.

Phase 5-1: The Golden Triangle Workbook #1

The cornerstone, the foundation, for building a system which will get a business to run without us, is what we refer to as the Golden Triangle, as it sets a rock solid foundation in place for seeing success in any business/enterprise you set out to do.

Phase 5-2 through 5-8

There are seven workbooks in these phases. Depending on your need as a company/individual, you may go through any one of these workbooks in any order. Often individuals will start with the Leadership Workbook then complete each of the five areas within the 5/30 Grid - Area 1: Marketing, Area 2: Pre-Sales, Area 3: The Sale, Area 4: Servicing, Area 5: Client For Life, and then complete the Profitable Partnership workbook. - Link 007 -
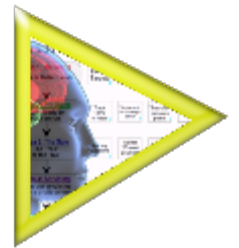
Phase 6 - Team - Others

Once we have discovered who we are, our Life Vision, Our Plan and developed our BOS we are in a position to now help others. What's interesting is that when we help others, we really help ourselves and give ourselves a chance to expand our vision, our reach, our influence and our finances far beyond what most of us ever realize we were capable of.

Phase 7 - Impacting The Masses

Have you ever wondered how you could clone yourself? Have you ever felt that you have a lot of potential which is not being fully tapped? Often in Phase 5, we discover, that we have so much more to give people and realize there is a powerful book that is deep inside of us. Yes . . . that would mean that we would become an author and/or speaker, someone who reaches out far beyond their own world to touch the lives of total strangers and make a difference in the lives of others.

Do not get overwhelmed by all the various phases. You will know intuitively where to get started, what to do, and how to best get started. Do not worry about doing everything right . . . just "start the car and start heading in a direction." Remember . . . it's a lot easier to change the direction of a moving car rather than one that is standing still. The more we know about each phase, the more we know we don't know and we will be going through all seven phases throughout our whole lives.

Questions/Challenges - Please Call Toll Free - 888.230.2300

TABLE OF CONTENTS

(Note: Click on link to go to this section - http://thevisionproject.net/GoldenTriangle.htm)

A Special Thanks

We would like to thank to the entire Vision Project network for helping to bring this workbook from an idea into reality.

We would like to give special thanks and recognition to David Thompson, Tom Kunz, GingerAnne Collins, Alan Stein, Judy Hardy and Jerry Hays. These individuals are a great example of what it's like to be givers / contributors to the entire network and always seeking ways to bring far more value back to the network that they are given.

Thank you for your amazing contributions and being a great example for all of us on how to: *"Trust the integrity of the system."* AND how *"We can accomplish far more together than we ever could on our own."*

You are all amazing!

Sincerely,

www.TheVisionProject.net

The 5/30 Solution Grid

	Level 1	2	3	4	5	6
Area 1: Marketing — More & Better Leads	Identify Targets 1	Develop & Deliver A Message 2	Group People & Messages 6	Measure Results 10	Personality Based Marketing 15	Dollar results marketing 20
Area 2: Pre-Sales — Move leads to conversion	Track 100% of leads 3	Implement 10+ Strategic Strike 5	Improve pressure points 9	Personality Driven 14	Large New Lead Sources 19	Model for profitability 24
Area 3: The Sale — The "Yes" or the "No"	Ask key questions 4	Master "Present Solutions" 8	Why prospects are lost 13	Apply 5 Freedom Fighters 18	Speed To Sell 23	Penetration Expansion 27
Area 4: Servicing — Turn our servicing into a profit center	Ask for referrals 7	Feed Successes into 1,2,& 3 12	Master steps pressure points 17	Measure all costs 22	Apply 5 Freedom Fighters 26	Turn into profit center 29
Area 5: Client For Life — Create profitable life-long relationships	Send monthly relationship newsletter 11	Obtain B2B and B2C referrals 16	Track all efforts & results 21	Implement R & D 25	Process For New Products 28	Apply 5 Freedom Fighters

www.synergysolutions.net   888.230.2300   Copyright © 2007 Synergy Solut...

5/30 Grid PDF Download - Link 008   //   http://thevisionproject.net/Process_3.html
Short Interview with Business Owners on change - 5 min. audio - Link 009 | 17 min. video - Link 010
Client Interview on 5/30 Grid - Video Part 1 - Link 011 (12 Min.) | Part 2 - Link 012 (27 Min.)

My WOW income/sales for the next 12 months is: $_____

I would like to be working _____ hours a week.

Current Income: $_____   Current Hours Working Weekly: _____

I commit to do everything in this workbook to the best of my ability to achieve my WOW income goal and work the number of hours I choose to work.

_____ _____/_____/_____

The 5/30 Grid - 3D Kit -

Connect with the individual who provided you this workbook for the 3D Kit or go to http://www.thevisionproject.net/GoldenTriangle.htm to order you own kit. It's a lot of fun to put together the 5/30 Grid for your business in something you can touch and feel.

We can use the 5/30 Grid and The Golden Triangle along with the 3D kit to do workshops, seminars, events or present/partner with any business or even community based organization. As we help others to see greater success, they will help us succeed.

A Rock Solid Business Operating System
<u>Workbook 1</u> - Approach A

"The Golden Triangle"

Tom Kunz, Past President of CENTURY 21, shares that he believes Personality Masteries is the DNA for understanding people and the 5/30 Grid is the DNA for every business operating system. When we combine the DNA for people with the DNA for business . . . we get something that is life/business changing.

Look at the 5/30 Grid as a journey NOT a destination.
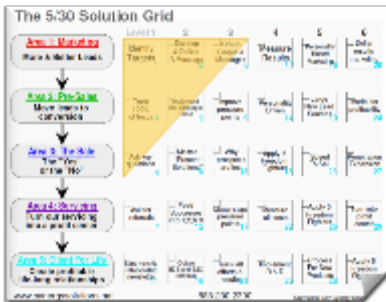
The 5/30 Grid is something that almost always creates a great deal of interest when viewed for the first time. People often comment "Hmmmm, what's that?" The simplicity is probably what draws most individuals in and the depth is what keeps individuals coming back to look at it over and over again and again.

What most people find to be most interesting probably is that the, **"More you learn about the 5/30 Grid as well as Personality Masteries . . . the more you know you don't know."** The power of the 5/30 Grid is that you can attack your business weaknesses from so many directions . . . and the weakness is that you can attack it from so many directions. Look at the 5/30 Grid as a journey NOT a destination. - Link 013 - for PDF download

"The Golden Triangle" approach, or "Approach A" is the most popular approach because it builds a rock solid foundation in place for your entire BOS - Business Operating System - Link 014 -. Throughout this entire workbook, you will find links. Some of these links are open links - Link 0?? - for anyone to see and some of these are Members Only Links. - Member Only Link A01 - Member Only links are specific information, tools, systems, processes, and/or template designs to help members leverage the entire 5/30 Grid + Personality Masteries network. - Link 015 - for more information on Personality Masteries.

There are a number of different ways you can use this workbook.

1. The fastest way to go through the workbook is with others who are already familiar with the 5/30 Grid. They will know a lot of the background information which will save you a lot of time.

2. Another way to go through the book is to answer the questions, do the assignments as you can from the content which is contained in the workbook alone.

3. A third way to go through this is to drill into all the many "open links" which are contained throughout this entire workbook. The "open links" provide additional information, training, mentoring, insight and instruction which will assist you to do all the assignments in a much better way.

   Obviously the more you put into your business, the greater success you will see from your efforts.

The results you see in your business/life are a direct result of the best/ideal combination of quantity and quality of activity. While it will take you longer to go through this workbook if you click on and review every link, you will obviously gain a lot more from that investment of extra time.

Some of the assignments and what you learn, may not seem to make sense and/or bring you immediate value. They will bring you value, over time, without question, so really dig in and master the knowledge contained in this workbook as well as all the associated links.

IF YOU DO NOT SEE THE VALUE from EVERYTHING within the workbook, please let the person know who provided this workbook to you OR call 630.393.9909 ext. 222 and we will work with you to assist you to SEE - DO - UNDERSTAND. There is something of value from everything you learn, but it can be hard for us to see this and we may need others to help us see how to apply certain things to our businesses/lives.

For this introductory workbook, we have made this workbook available at no charge but do request that you make a $10 donation, or whatever you are able to afford, to Life Masteries Institute (LMI). LMI is a 501c3 IRS approved non profit organization and helps in many community based projects such as mentoring young people and kids at risk, stopping child trafficking and job creation through teaching people how to build their own profitable businesses to name a few.

http://www.LifeMasteries.org/

This workbook is made available to you as a result of the very hard work of very committed people in LMI. They desire to make additional resources available to you, your family, and your network. Thank you for your generous contribution and we believe you receive far more back than you coritribute.

Profitable Partnerships

If you received a printed copy of this workbook make sure you thank the person who gave you a copy. **A printed copy is ideal so you can take notes and write out your assignments.** In addition to the printed copy, you will also want to obtain an e-copy of the book as well. The e-copy will provide you with the important links which are connected to additional audio and video learning resources. You will learn the most through using both a printed copy AND the e-copy. - Link 016 - http://www.TheVisionProject.net/Process_3.html for your own e-copy.

While the 5/30 Grid really is easy, it does help a great deal to have one on one coaching, a mastermind group, partnerships, and/or an MSP - Marketing Solutions Provider to assist you with the best way to approach the 5/30 Grid to bring the most value to your company, with the least amount of time/resources devoted, and obtain the best results in the least amount of time.

Connect with the individual who introduced the 5/30 Grid to you or you may call toll free 888.230.2300 for additional assistance. For additional details on:

- One On One Coaching   - Link 017 -
- Mastermind Group   - Link 018 -
- Profitable Partnerships   - Link 019 -
- MSP (Marketing Solutions Provider   - Link 020 -
- Mastermind *MAGIC* template   - Members Only Link A02 -

Name Of Individual Who Provided This Workbook To Me: _____

Phone Number Of Individual Who Provided This Workbook To Me _____

Date I was given workbook   ____/____/_____

Date I will start to work through this workbook   ____/____/_____

MSP or ActionVision Certified Consultant/Coach

_____

_____

Certification Number: _____

NOTE: This is a workbook! That means that there is work which will be required to be done to gain benefit from what you learn. It is strongly recommend that you work with between 3 and 12 other individuals in going through this workbook. We can accomplish a lot more together than we ever could on our own.

[ ] - Assignment 1 - Work to solve my biggest challenge

Purpose

Step 1: Examination - Learn the process of overcoming any challenge you face in any area of your life.

What is the biggest challenge I am currently facing in any area of my business/life?

_____
_____
_____
_____

1 to 10, with 10 being highest, how would you rate the following:
   ____ 1. How serious the challenge is for me.
   ____ 2. How much I would like to solve this problem.
   ____ 3. How confident I know or could figure out the solution.
   ____ 4. How much help I would like in solving the challenge faster.

Do you want to solve YOUR above challenge? - Link 021 -

"You can never solve a problem on the level on which it was created."
Albert Einstein
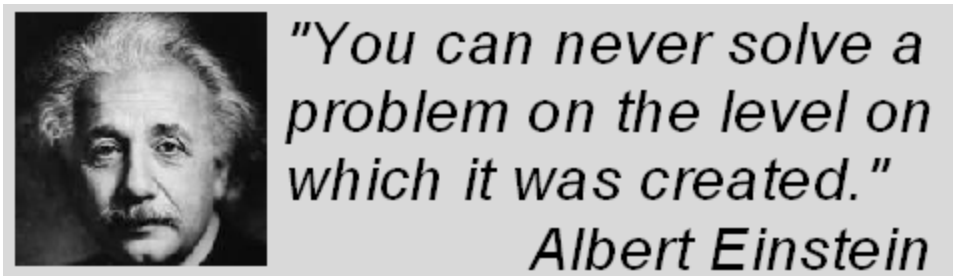
Assignment

Obtain a proper examination of the various areas of your life/business to address the areas of great need/opportunity.
   - Link 022 - 5/30 Grid Assessment
   - Link 023 & Link 024 - Other possible assessments

Estimated Time To Complete

Will depend on which assessment(s) you complete. An hour invested into the right assessment can save 100's or even 1,000's of hours of time.

Assignment: Started - ___/___/____   Completed - ___/___/____

Signed Off: _____   ___/___/____

Overview - "Why Assignment Is So Important"

The 3 Steps To Success principle moves us from where we are currently to where we desire to be.

Step 1: Examination

Step 2: Solutions

Step 3: Implementation

Step 1: Examination - Just like a doctor will never give you a prescription without doing an examination, if anyone ever gives you a solution, without first doing an examination, it is almost a guarantee that they are selling you something rather than seeking a solution to your biggest challenge.

Step 2: Solutions - Normally people function with three types of solutions - a basic, intermediate, and advanced. Each type of solution will have it's own strength and each has it's own weakness.

Step 3: Implementation - Some people have a strong sense of urgency and others tend to take their time. Many people will say they want to solve their biggest challenge but when the solution is presented to them, they in reality, choose to not take action, therefore; making the choice to accept their biggest challenge.

This entire workbook is designed to help us learn how to apply the Natural Laws which govern people and business. When we learn to apply the right Natural Laws to our challenges/problems, along with learning how to attract the right people into our lives (Personality Masteries + Natural Laws), we will see greater success in every area of our life.

Do you want to solve the above question? - Link 025 -

We believe that you, like most others who go through this workbook, will discover very quickly that the more you know/learn the more you'll know you do not know. That has been the journey for those who developed the workbook. Developing a workbook for any of the vast IP - Intellectual Property - is one of the best ways to actually learn at a deep level, what the IP can do for us personally as well as those around us.

IMPORTANT

If you ever find that you feel that you are running out of time, then it's very important that you go through the 10 videos for the 3 for 1 Principle. You'll notice, that as you become more effective, you will have more opportunities . . . and the cycle will seem to never stop.

MORE True Knowledge/Action = MORE Opportunities = LESS Time

OR

>KA = >O = <T

Step 2: Discover The Best Solution

We have found that every business challenge faced tends to fall into one of seven major categories or areas of focus. The benefit of identifying the major category is that it will empower us to discover the solution much faster and will provide us with a much better solution.

Leadership
Excellence In
Leadership & Success

1. [   ] - Leadership is the core to vision, oversight for all people challenges, planning, systems and tools. This is the area where we can often find the solution to the heart / core for any challenge / problem being faced. If leadership has provided a strong vision, developed the planning tools, resources, and expertise necessary to succeed, and has empowered those within the company to build and implement the proper systems, then we can go further into the other six area. Personality Masteries should first be embraced by those in leadership, who can then lead every other company team member to personally learn about themselves and everyone they connect with. Masteries by everyone means success for everyone. **DO NOT GO FURTHER UNTIL WE ARE SURE THE CORE ISSUE IS NOT A LEADERSHIP ISSUE!**

Area 1: Marketing
More & Better Leads

2. [   ] - As we'll learn as we get further into the 5/30 Grid, each of the five areas are critical to the overall success of any company / organization. If we are having challenges with generating either the quantity or quality of leads, then we should look for the solution in **Area 1: Marketing**.

Area 2: Pre-Sales
Move leads to conversion

3. [   ] - If our sales closing ratio (leads generated to leads closed) is less than 60% we should seriously consider looking into **Area 2: Pre-Sales**. Often companies do not have individuals in **Area 2: Pre-Sales** but combine Areas 2 and 3. This is not a good idea. If we are not converting leads as quickly as we would like to, then **Area 2: Pre-Sales** is a great place to look.

Area 3: The Sale
The "Yes" or the "No"

4. [   ] - Sales closing ratios are a function of **Area 2: Pre-Sales** and **Area 3: The Sale**. If our sales force is not taking personal ownership for a lack of sales, we need to look at the culture as well as the training within this area of our business.

Area 4: Servicing
Turn our servicing into a profit center

5. [   ] - Do we generate between three and nine referrals from each one of our clients? If not, then **Area 4: Servicing** is probably not living up to it's full potential. When the right systems are implemented along with Personality Masteries, our servicing area can actually produce more sales than Areas 1, 2 and 3 combined. To do that we must create a RAVING FAN experience.

Area 5: Client For Life
Create profitable life-long relationships

6. [   ] - Another area that most companies miss is **Area 5: Client For Life**. The tragedy of this is not in the business that we lose but in that we do not even know the true costs of the loss, as we'll never get a bill for the lost revenue.

Profitable Partnerships
Creating WIN WIN WIN

7. [   ] - Profitable Partnerships is the seventh potential area that most companies miss. If our challenge is that we're not profitable enough, our lead costs are too high, or we're not converting enough of the leads, a part of the solution may rest outside the 5/30 Grid. If we learn to turn our clients from a Quadrant 1 client to a Quadrant 4, Profitable Partnership, we will see a very different business than what we have now.

Step 3: Implementation

In many ways Step 1: Examination, and Step 2: Solutions, are far easier than Step 3: Implementation. How many of us have studied something in a book, workshop, seminar, talking to someone, or in the classroom and it seemed very clear, and that it should work . . .but when we implemented it, it didn't work?

How many of us have been excited, motivated and inspired, knew we would follow through . . . and then we didn't?

How many of us have wanted to do something we know that we should be doing . . . but then don't do it . . . and then find ourselves saying "I just didn't have enough time!"?

Why do we so often fail when we know it is so important that we follow through?

"You can never solve a problem on the level on which it was created."
Albert Einstein
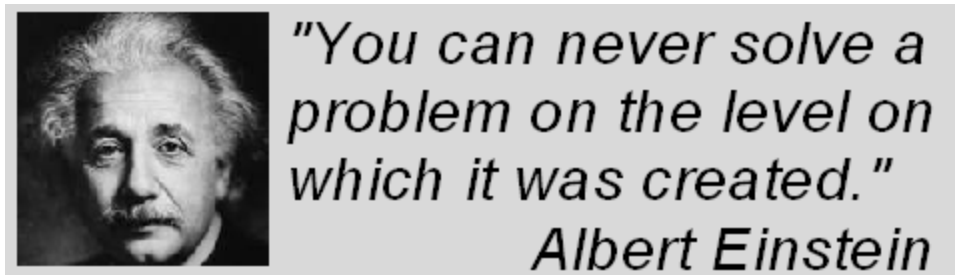
Albert Einstein actually shares the answer in the above quote. We often run into a problem and then try to solve that problem at the same level it was created. We seek to solve it in the dimension we currently reside in, get jammed, and then spend decades stuck in the same area.

If we have had a thorough examination (Step 1) by a MSP - Marketing Solution Provider who has been certified by Life Masteries Institute (more on that later in the workbook) we can have confidence that they have the best training in the world to help us quickly identify where we are lacking.

If we then have someone certified in the ActionVision system develop a master plan for our business based on the assessments we can have confidence we have a rock solid plan which will give us a map as to how to get where we want to go.

What companies often are lacking is the fire power, the expertise, the people power/resources to get the work done. All the assessments, plans, training, and knowledge in the work, without the ability to follow through and take action, is actually pretty worthless. More companies are finding that contracting with certified VA's - Virtual Assistants is the answer to the challenge / problem as they are able to quickly execute in taking action by doing the right things - in the right way - over the right period of time. It's always amazing to see how many problems go away when we do this.

http://TheVisionProject.net/VAs.htm

The good news from a business/professional perspective is that you will be earning a lot more money working the hours you work. The bad news is that you will start to lose balance in all areas of your life AND you will start to find that the NEW opportunities are very enticing. How does one break this cycle? The only way we have found people to be successful in breaking this cycle is by committing to the 10 Natural Laws which are the foundation for the 3 for 1 Principle. It's far better to commit them to practice sooner rather than later. Do one six minute (average) a day for 10 days. Repeat twice.

10 Videos - 3 for 1 Principle - Link 026 -

[   ] - Assignment 2 - Starting or Joining A Mastermind Group

Purpose - <u>Members Only Link A03</u> -

To insure I follow through on taking action on all that I learn.

Assignment

Select 3 to 12 other professionals I will seek to complete this workbook with.

Assignment: **Started - ___/___/____   Completed - ___/___/____**

Signed Off: _____   ___/___/____

Estimated Time To Complete

15 minutes if you have strong relationships and/or systems. Weeks to months if you have weak relationships and/or systems.

You can start out with one or two others and build the group from there. If you just give out this workbook to total strangers who are business owners, you would be surprised on how quickly other business owners will be attracted to you.

#01. _____ - Certified Consultant/Coach

#02. _____ - MSP - Marketing Solutions Provider

#03. _____ -

#04. _____ -

#05. _____ -

#06. _____ -

#07. _____ -

#08. _____ -

#09. _____ -

#10. _____ -

#11. _____ -

#12. _____ -

#13. _____ -

#14. _____ -

Special Note

There are two individuals you will ideally seek out to have in your mastermind group.

MSP - Marketing Solutions Provider - Link 027 -

If individuals have achieved this designation you know that you have someone who has been through extensive training, testing, and application for not only the 5/30 Grid but also Personality Masteries, Leadership Development, Profitable Partnerships, Marketing Excellence, Marketing Resources, Prospect Conversion System (PCS), Sales Success, Servicing, Client For Life systems, and Community/Business Partnerships development to name just a few.

Individuals achieve this designation through Life Masteries Institutes which is an IRS approved 501c3 non profit organization. Life Masteries Institute is committed to finding the best resources to train those certified as MSP to help businesses SEE the best solutions to their problems/challenges and goals, to UNDERSTAND the value of those solutions and then how to best implement those solutions, and then to DO, to take action, to follow through on what we know we should do to achieve our full potential, individually as well as a company.

ActionVision certified consultant/coach - Link 028 -

Have you ever said: "I know what I need to be doing, I just don't do it!"

Actually the truth is that we are doing everything we Deeply KNOW we need to do and if we're not doing something it's due to one of three reasons.
1. We do not know the true deep benefit of taking action.
2. We do not know the true deep costs of not taking action.
3. We do not know how to get what needs to be done with our current level of resources, knowledge, time, or networks.

The truth is that we do not get a monthly bill for those things we "know" we should be doing but don't do, so we really never know at a fully conscious level the costs, lost opportunities, missed relationships, etc. for not following through on what would be best for us to do.

Individuals who are certified in ActionVision are trained and highly skilled in helping you to discover your Life Vision, your Business Vision, and then determine the best actions to take to achieve your vision. The ActionVision system is so powerful that it is effective for a leader of a fortune 100 company and so simple that the youngest individual, through community based organizations to be on the system, is a five year old.

It is the most effective set of tools and systems to figure out how to clone yourself, earn a lot more money, while working a lot less hours, have less stress, and have greater life balance and success in every area of your life.

Overview - "Why Assignment Is So Important"

Albert Einstein

"You can never solve a problem on the level on which it was created."

Albert Einstein - 1879 to 1955

As a result of getting stuck in our way of thinking we earn less money, work more hours, have more stress, and have a less balanced life.

The challenge most people have is not that they do not know enough, the challenge is that they do not follow through on what they do know. When we go through a training course, a workshop, a book, or any type of head knowledge is that, it is just that, head knowledge.

While there is nothing wrong with head knowledge, the challenge is that if we do not take action on what we learn then we have surface knowledge rather than deep knowledge. Deep knowledge comes from taking action. Taking action reveals very quickly if we really learned what we thought we did and/or if what we learned will actually produce results.

If we "know" we need to do something and do not do it, it is primarily for one of **3 reasons that we do not take action**.
1. We do not know the full value of taking action.
2. We do not know the cost of not taking action.
3. We do not know how to take the action with our current level of resources.

When we understand, at a deep level, the 3 for 1 Principle - Link 029 - we understand that when we take the right actions, in the right way, at the right time, that we will gain, over time, 3 hours back for every 1 hour we invest. When this happens we gain an unlimited amount of time. *"Yes . . . I know that this seems very hard to believe, but it's like the law of gravity or any Natural Law. It's true regardless of whether we believe it or not. To those who believe and follow the Natural Laws, they will gain the benefit from the discipline of learning and doing."*

We have all probably heard the saying, "If you want to get something done, give it to the busiest person." Why is this true? Busy/productive people seem to know intuitively how to always get more done.

The NEXT Dimension Principle

Dimension "@"

Break through to NEXT Dimension comes at a 10

Dimension "&"

Dimension "M"

Detailed View

10
Level 4: Navy Seals Drill Instructor

9

8

7   Level 3: Coach

6

5

4   Level 2: Teacher

3

2   Level 1: Cheerleader

1

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NOTES
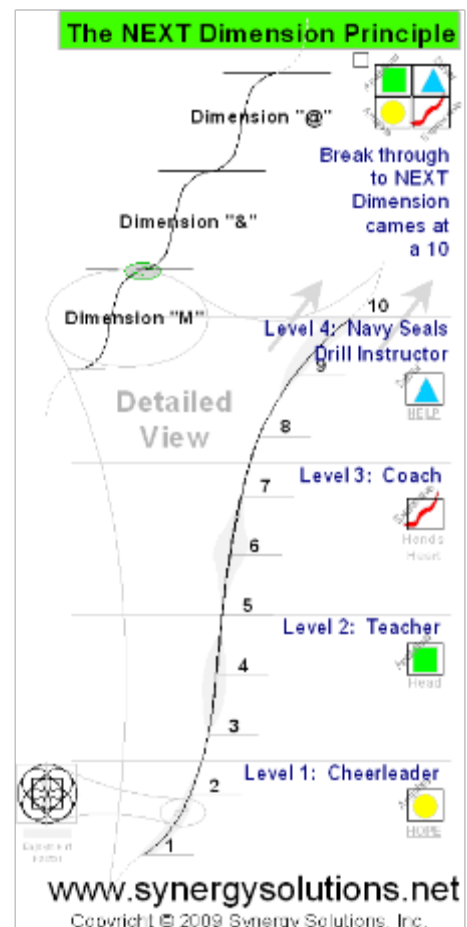
This workbook is a result of thousands of hours of learning, from many people, all around the world. There are times where you will feel like giving up, where you will feel like time is being wasted, where you feel like you know what is being shared . . .

We will share a number of stories throughout the entire workbook. These stories are designed to help you understand at a deep level something that probably can not be taught without a story. Please make sure that you pay very close attention to each story and work to figure out:

1. Why we shared the story when we did.
2. What you learned from the story.
3. How you will personally apply the story.
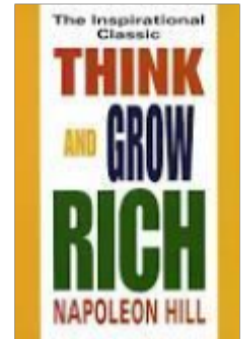
In Napoleon Hill's classic book "Think And Grow Rich" Mr. Hill shares the concept of mastermind groups and their power. If we have people who are taking this journey with us, we are more likely to not only follow through, but the journey will be far richer, we will learn a great deal more, and we will have so much more fun. DO NOT SKIP this assignment to gather 3 to 12 other people to join you in this journey.

Ask your executive coach about and/or discuss in your mastermind group the following model and how it applies to belief . . . and The NEXT Dimension Principle.

NOTES
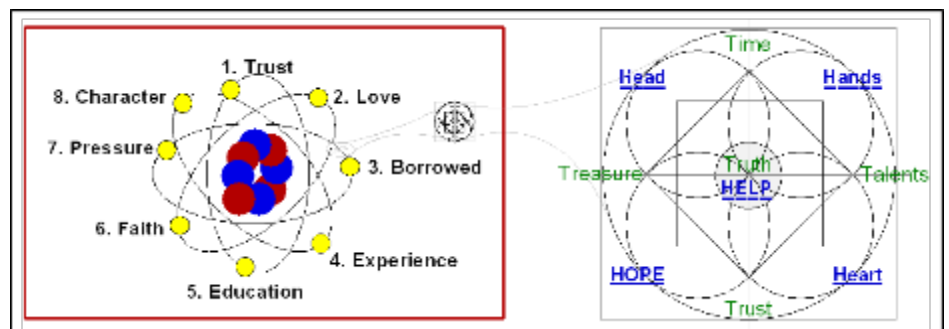
We would like to share two stories with you which we believe will change the way you do business/life forever. Both stories were given to us as a gift from Tom Kunz, most recent Past President of CENTURY 21 Real Estate LLC. These two stories, brought together, will . . . if you allow them, change your life/business forever. Tom achieved business success that very few people achieve, of leading a worldwide company of over 140,000 sales professionals in over 70 different countries.

Tom is a very humble and giving man who has a passion for making a difference in the lives of people. Tom does not have a college degree and was not born into a family with connections. Tom saw his amazing success in large part because he sees, understands, and does things that most people do not. We trust these two stories will change your life/business as much as they have ours and those around the world.

The Grandpa Chappell Story . . .

Tom fondly shares this memory . . .

"I suppose, I was like most sixteen year old boys and was at the age where I felt I had most everything pretty much figured out. My parents would share things with me, teachers would share things with me, and other authority figures would work to get through to me. Honestly, when I think back, there wasn't a lot getting through at the time.

My Grandpa Chappell, in his deep wisdom, shared something with me that I'll never forget. He said 'Tom, what I'm about to share with you may not make sense right now, you may even resist, or write off what I have to share, and that's alright. All I ask is that you write down what I have to share with you, and at some later point in your life go back and read it again.' Years later I thought *"What would my life have been like if I would have listened closer and applied sooner those things Grandpa Chappell had to share?"*

Do you know what's interesting . . . As I think over the last 40 years of my life, as I rose to the President of the largest real estate franchise in the world, I now realize that the mindset of "I pretty much know what I'm doing." does not end with teenaged boys or girls but actually can get much worse with adults and leaders/owners of companies. When we think we've got things figured out and pretty much together, that is when we know we're stuck. What you are about to be exposed to, will, if you allow it, change your life forever. If you think it's too complex, doesn't apply to your business, or does not apply to the specific need you are facing right now . . . I would then reference the next story.

The Golf Pro Story . . .

I, like many Presidents of large companies, love to golf and have invested in a lot of golf equipment to help improve my game over the years. A number of years ago I decided that I probably should have a golf pro give me some pointers on my game. After we had exchanged pleasantries he asked me to give him the club from my bag which I would never use because it never produced the results I wanted it to.

He dropped the golf ball, took that club that never seemed to work for me, and hit that ball so far, that it seemed like it went forever and was straight as an arrow. He put the club back in the bag and then casually said "Well Tom, we know it's not the clubs, don't we?"

Get a pro to help you install and use the systems you will find in this document. When you travel the world as I have and are exposed to all the things I have been exposed to, you think you've seen and experienced everything . . . until you see what you are about to see. **Trust the integrity of the system!**

"Trust The Integrity Of The System!"

Tom Kunz

What's interesting . . . is that most individuals would say we have integrity . . . while thinking that many people around us do not have integrity. If you want a direct/simple message as to what Integrity really is, go through the following two short recordings.

Do you have challenges with people around you not following through on what they say they will do?

- Why there is such a lack of integrity? - Link 030 -
- The Elephant Room - What is integrity? - Link 031 -

* * * **Share these two recordings with everyone in your life!** * * *

[ ] - Assignment 3 - Solutions / Develop A Plan

Purpose

Develop a detailed plan which helps us to clearly understand the specific benefits we will see from making the sacrifices to SEE/Learn - DO - and UNDERSTAND those things we do not know.

Assignment

Develop a comprehensive 12 month business/life plan.

Estimated Time To Complete

If you have a certified ActionVision consultant build your plan for you, it will not take you any time. If you develop one on your own, the time it takes you to develop your plan, the quality of your plan, the likelihood of it working, largely depends on how successful you have been in the past in doing this.

Assessment Completed   ___/___/___   by: _____

Written Plan Developed   ___/___/___   by: _____

Assignment: Started - ___/___/____   Completed - ___/___/____

Signed Off: _____   ___/___/____

Overview - "Why Assignment Is So Important"

A great plan will build on our plan based on the 5/30 Grid, the Natural Laws, our Life Vision, our personality, our strengths, weaknesses, networks and all the other factors which will help us to reach beyond our dreams and goals in every area of our life.

Building a plan is really and art as much as it is a science.

Most people invest more time and money into a vacation than they do into the full development of their full potential. That is a shame! Why? Have you ever felt that you were not living up to your full potential? Have you ever had the deep down feeling that you could be earning a lot more money, working fewer hours, having more friends and deeper friendships, having less stress and an overall greater balanced life?

5 Steps to Great Planning - Improve Time Management - Foundation for ActionVision

Step		Measurable
Step 1: Developing a Driving Force		Measurable
Step 2: Three to five major areas for focus.		Not Measurable
Step 3: Four actions within each of the five major areas.		Measurable
Step 4: Quantification of specific actions for maximization of effectiveness.		Measurable
Step 5: Review results for consistent actions and time management maximization.		Measurable

Step 1: Driving Force

Step 2: 3 to 5 areas of focus

Step 3: 4 major actions

Step 4: Quantify actions

Step 5: Take/review actions

Action #1
Action #2
Action #3
Action #4

Completed
Worked on
Completed
No work done

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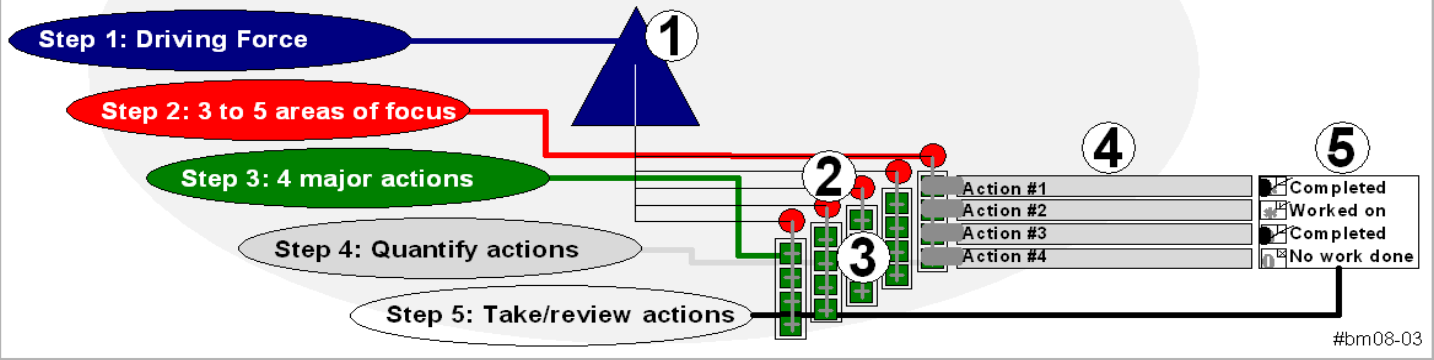
After we complete the assessment - Step 1: Examination - we are then in position to build a detailed business/life plan. This plan should not only incorporate all our own personal things but also deep in the core of the plan/coaching should be the 5/30 Grid + Personality Masteries.

One of the most powerful aspects of ActionVision is the ability to measure our efforts and then correlate those efforts to our results. For additional information on ActionVision - Link 032 -

Usually after three months of tracking/scoring you will see very clearly if you are . . .
  - Doing the right actions . . .
    - In the right way . . .
      - Over the right period of time!

YTD												
% Completed	18 %	27 %	40 %	43 %	48 %	52 %	57 %	%	%	%	%	%
% Of Goal	40 %	34 %	30 %	28 %	57 %	78 %	97 %	%	%	%	%	%
Difference	22	7	-10	-15	9	26	40					

% Completed	18 %	36 %	66 %	52 %	66 %	73 %	86 %	%	%	%	%	%
Points, Received / Possible Points	8 / 44	16 / 44	29 / 44	23 / 44	29 / 44	32 / 44	38 / 44	/	/	/	/	/
Month	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May.	Jun.	Jul.	Aug.	Sep.	Oct.
Year-To-Date %: (work being paid on)	0 %	0 %	0 %	6 %	9 %	10 %	14 %	%	%	%	%	%
next 12 months	9 / 0	10 / 0	20 / 0	14 / 3	17 / 3	10 / 2	8 / 4	/	/	/	/	/

As we are able to measure our efforts and results we then can determine the overall effectiveness of our entire BOS - Business Operating System. This includes measuring the effectiveness of our plan, our coaching, our mastermind group(s), our systems and anything else we are doing.

ActionVision/our plan should be like an air traffic controller with all of our systems, people, networks, tools, and processes being the planes which are governed by one central control tower.

Another way to look at it would be like looking at our lives as a symphony. Each section of the symphony might like to control the other parts, say they are more important, lift themselves up . . . when in fact all parts are important to the success of the other parts. Success in life comes as a result of all the different aspects of life respecting the value of the other parts of life and all playing a beautiful sheet of music for the mutual benefit of everyone.

[   ] - Assignment 4 - Personality Masteries - Level 1 Certification

Purpose
To learn the DNA of myself and those around me.

Assignments
1. Ask five people in your life the two sets of personality questions and then get an assessment from someone who is certified.
2. Become certified in Personality Masteries - Level 1 Certification

Estimated Time To Complete
12 Hours online training + Homework time - Link 033 -

Plot out those around you as to what personality they are. How can you, as a team, better work together based on everyone's knowledge of Personality Masteries?
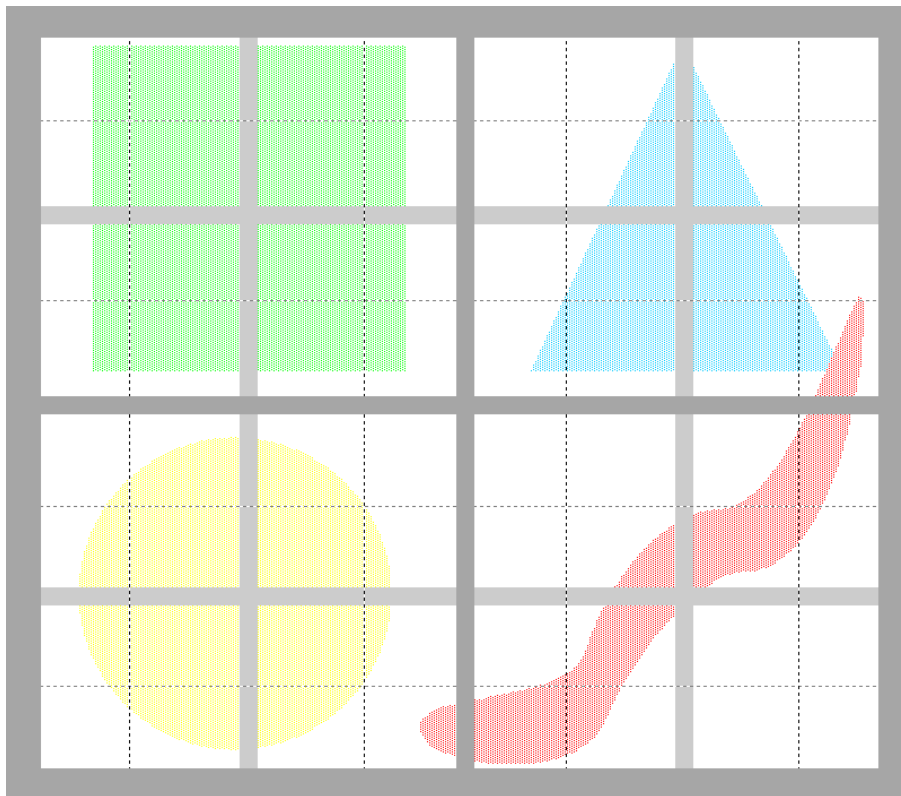
Assignment: Started - ___/___/____   Completed - ___/___/____

Signed Off: _____   ___/___/____

Overview - "Why Assignment Is So Important"

Some individuals will do this certification right away and others will take a longer time to get to it. What is common with everyone who goes through the certification process is that once they go through it . . . they, without question, wish they had gone through it sooner.

Yes . . . you will be exposed to Personality Masteries throughout the entire process so you will pick up a lot as you go through, but you will not gain what is in the Level 1 Certification any other way than by going through the certification.

Welcome to the simple Personality Masteries assessment. The assessment will help you and others in every area of your life - personally - relationally - emotionally - financially - in your career and in every relationship that you have in any area of your life.

This assessment can be used by an individual to assist them in any area of their life, can be used by businesses, community based organizations, groups/associations/chambers . . . or really any group of people. To best understand how this applies to you individually and/or a group of people you are doing the assessment with, it is strongly recommended that you have someone who has been certified in Personality Masteries to assist you in understanding what the assessment really means to you individually/as a group and then what are the best NEXT Step actions to be taken.

It is not unusual for individuals to say "Wow, this assessment is right on target. It's like they know me better than my mom does." Personality Masteries has been developed over the last twenty plus years and is designed to help individuals and teams better understand themselves as well as those they work and connect with on a daily basis.

Ask yourself,
1. Which of these four shapes would I tend to like most, 1st, 2nd, and 3rd?
   ___ Cube,   ___ Pyramid,   ___ Wavy Line,   ___ Ball

2. Which of the following things would cause me the most frustration, 1st, 2nd, and 3rd?
   ___ Not being done properly and in order
   ___ Out of control
   ___ Boring or not fun
   ___ Conflict with others
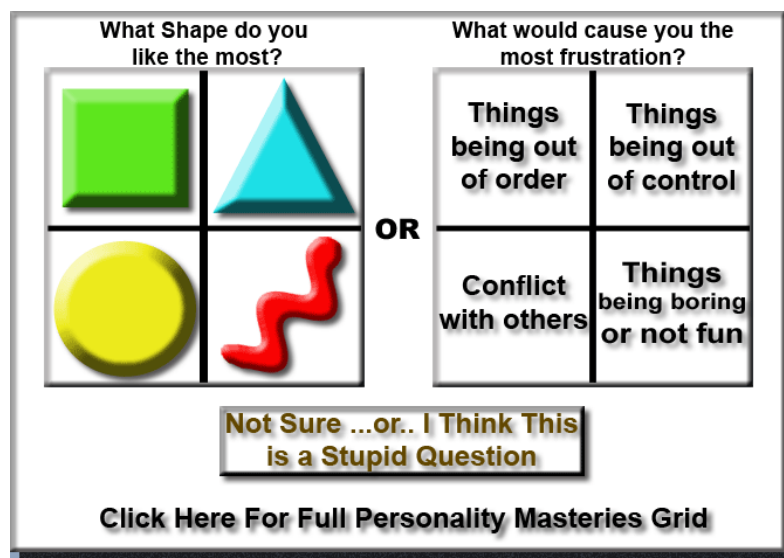
For MORE FUN . . . pass this along to others you know, family, friends, loved ones, co-workers, clients . . . really anyone you know will benefit from this.
- MORE PERSONALITY RESOURCES - Link 034 -

5 Simple/Easy Steps To Success

Step 1: Determine your primary and secondary personality
Step 2: Review report
Step 3: Request a complimentary individual and/or personality coaching session - 888.230.2300 ext. 222
Step 4: Obtain Personality Masteries - Level 1 Certification - Link 035 -
Step 5: To see life/career success, develop a detailed plan and then obtain the specific training/coaching needed to follow through on doing the right actions, in the right way, over the right period of time.

Actually identifying our own personality or someone else's is very easy. Mastery of what that means to ourselves and others . . . takes a lifetime.

Enjoy!

If you chose the "Cube" or "Not being done properly and in order" then we would tend to refer to you as an "Analytical" personality type.

- [Link 036](#) -
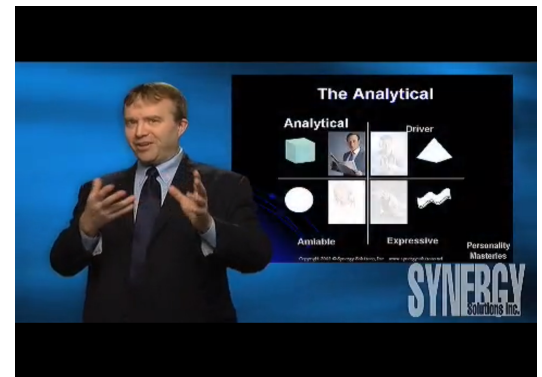
If you chose the "Pyramid" or "Out of control" then we would tend to refer to you as a "Driver" personality type.

- [Link 037](#) -
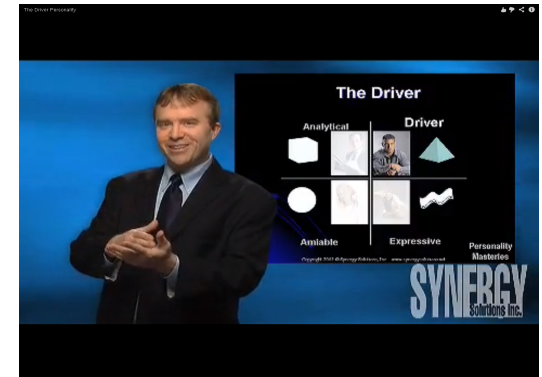
If you chose the "Wavy Line" or "Boring or not fun" then we would tend to refer to you as an "Expressive" personality type.

- [Link 038](#) -
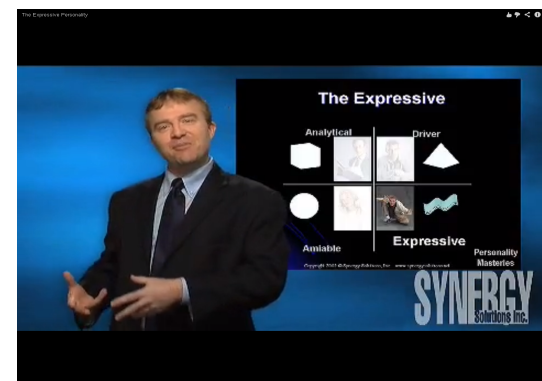
If you chose the "Ball" or "Conflict with others" then we would tend to refer to you as an "Amiable" personality type.

- [Link 039](#) -
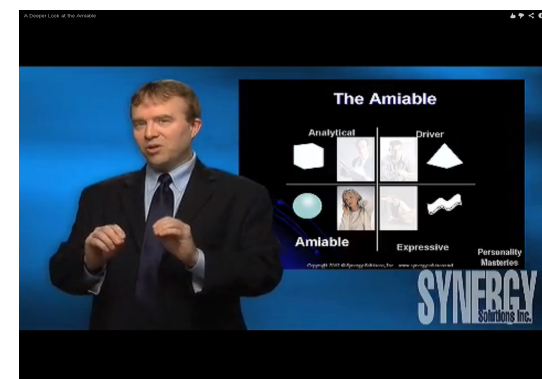
[   ] - Assignment 5 - Discover Our Very Own Life Vision

Purpose
Discover the reason we were put on this planet.

Assignments
Minimum . . .
1. Discover our very own life vision - Lesson #4 - Link 040 -

Ideal . . .
2. Go through all seven lessons - Link 041 -

Estimated Time To Complete
1. 20 minutes to 60 minutes for version 1
2. 111 minutes for 7 lessons plus homework time

Assignment: Started - ___/___/____   Completed - ___/___/____
Signed Off: _____   ___/___/____

Overview - "Why Assignment Is So Important"
This is one of the most important assignments and one that many people will skip. Why? We're not sure. Is it that people are fearful of knowing their Life Vision as they fear that they may not be able to achieve it? Is it that people try to be too precise and think they need to figure it out the first time? Is it that people lack the deep understanding and lack the trust of the importance of this to the success of the integrity of the system?

Whatever the reason for not doing the lesson, we trust that you will not allow any of those reasons or any others to prevent you from seeking your Life Vision. Your Life Vision, once discovered, will help you in ways that you probably will never fully realize.

Discovering My Life Vision

Step 1: List out all of those things you are passionate about.
Step 2: From your list of passions develop a short Life Vision Paragraph
Step 3: Share this with others
Step 4: Fine tune as you seek to "Reach Beyond Your Dreams And Goals In Every Area Of Your Life."

Our Passions

Life Vision - Don't worry about it being "right" just do your best and over time you will continue to tweak it until you get it just where you want it to be.

Connect My Life Vision Into
The Company And Others Around Me

Step 1: If company has not developed a company vision then do that with key group of people
Step 2: Look for the connections between those things you/others are passionate about
Step 3: How does your life vision fit into the company vision and the life vision of others around you?
Step 4: Seek specific actions steps for everyone to take to help everyone achieve their life vision

Often, for whatever reason, people will skip the life vision or the connecting of visions together. When they do this they are not "Trusting The Integrity Of The System."

While that is each person's option to trust or not trust it is critical that "IF" a person does not earn the income they desire, is not working the number of hours they desire, if the person has too much stress, or if their lives are not balanced then it is very important that the individual takes personal ownership and DOES NOT blame the system or does not question the integrity of the system but realizes they took charge of a system that maybe they should not have taken charge.

Step 1 - Group Vision

Step 2 - Sub-Group Vision

Step 3 - Individual Vision

Passion
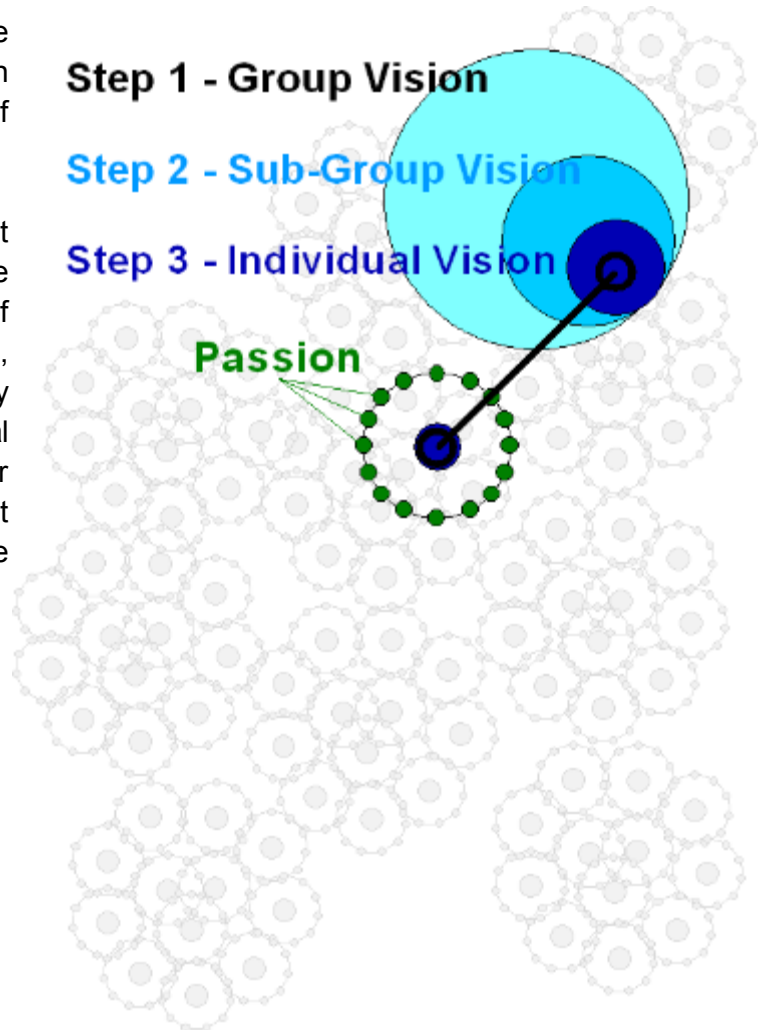
[   ] - Assignments 6-1 . . . TO . . .06-6 - 5/30 Grid . . . Finally!

Purpose
To develop the cornerstone, so to speak, of our BOS - Business Operating System.

Assignment
Create due dates to complete The Golden Triangle within the 5/30 Grid.

Estimated Time To Complete
If you have ActionVision plan and are working it very hard, it will usually take three months to get the corner stone in place. If you are doing it without an ActionVision plan it can take years to do this and the foundation to your BOS system is often not built properly.

Assignments:
Box 1: Identify Targets   Goal - ___/___/____   Completed - ___/___/____
Box 2: Develop & Deliver A Message   Goal - ___/___/____   Completed - ___/___/____
Box 3: Track 100% Of Leads   Goal - ___/___/____   Completed - ___/___/____
Box 4: Ask Key Questions   Goal - ___/___/____   Completed - ___/___/____
Box 5: Implement 10+ Strategic Strike   Goal - ___/___/____   Completed - ___/___/____
Box 6: Group People & Messages   Goal - ___/___/____   Completed - ___/___/____

Signed Off: _____   ___/___/____

Overview - "Why Assignment Is So Important"

If you are asking "Can I get started on the 5/30 Grid without the first 4 lessons being done?" The answer is "Yes you can."   If you ask "Are there are risks to doing it this way and might it take me longer, in the end, that if I just followed the workbook?" the answer is "Yes, it might take you a lot longer and/or it might not work.

When we talk about "Trusting the integrity of the system." we obviously must understand the system to follow the system, and if we don't understand the system and/or do not follow the system it's not the system that failed us but us failing to follow the system which has caused the failure.

The first four lessons are designed specifically to help you have the foundation in place before you start to build the home. Yes, it is true that for most people, putting the foundation in place is not fun, sexy, or something that we really enjoy doing. Yes . . . others won't see the foundation and Yes . . . a house with a weak foundation may actually be livable for some period of time.

In the end though . . . it will always cost us more when we do not take the time to build a solid foundation for both our business and our life.

A. Overview for different ways to learn/implement the 5/30 Grid

The 5/30 Grid is an amazing business operating system and once developed you will be able to start and run any type of business anywhere in the world.

Four ways a company or organization may go through the 5/30 Grid
1. **Diagonal Learning**
2. **Horizontal Learning**
3. **Vertical Learning**
4. **Specific Box Learning**

In most situations **"Diagonal Learning"** is the most effective way to learn. This produces the fastest results and provides the most solid foundation for building your BOS – Business Operating System. We accomplish this as a result of using the numbers in each box and go from the upper left to the lower right.
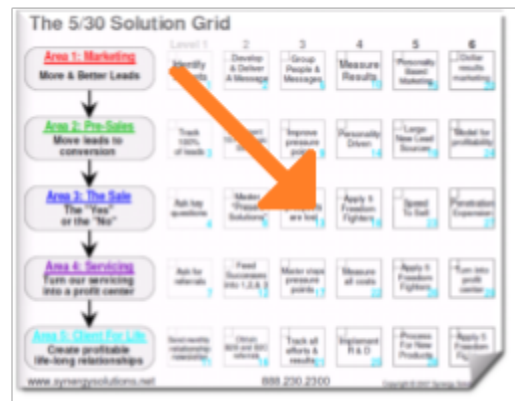
Workbook 1 - The Golden Triangle uses the "Diagonal Learning" to develop a rock solid foundation in place for - Marketing - Pre-Sales - and Sale.

When we do this correctly our BOS - Business Operating System will have a foundation that most businesses do not have after years or even decades of development.
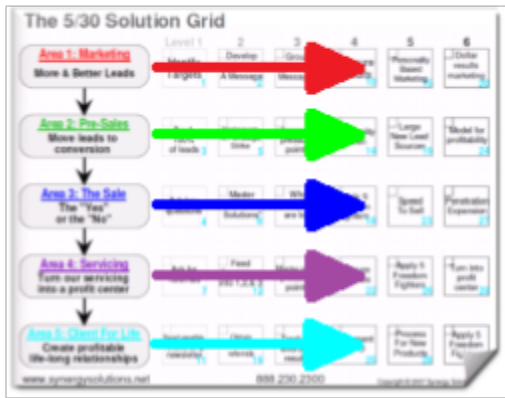
"Horizontal Learning" is often applied if a company has specific individuals or departments which cover each of the five areas within the business and desires each individual or division to gain specific expertise faster. Even when "Horizontal Learning" is applied initially, many companies will have everyone in their company go through "Diagonal Learning" to insure that all five areas and all thirty boxes are fully integrated.

"Vertical Learning" is based on the six levels of proficiencies within each of the five areas. This learning may be used to gain greater and deeper integration within a company and/or can be used if there is a desire to have a balance of learning and application within the five areas.
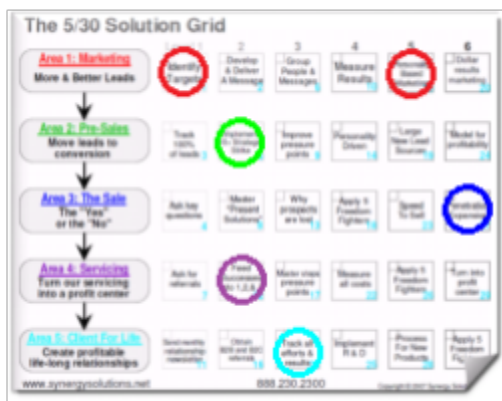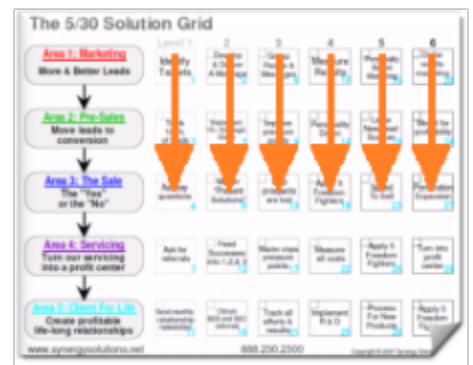
"Specific Box Learning" is often employed when a company is having challenges with specific areas or boxes within the 5/30 Grid. If done properly, this can provide a company with very specific and directly targeted efforts, which will produce faster results. This is normally applied after the full 5/30 Grid has been implemented and is not designed to be a quick fix but a strategic application to fine tune and tweak a BOS – Business Operating System - which is already very effective.

[   ] - Lesson 6-1. Box 1 - Identify Targets

Purpose - Members Only Link A04 -

Develop a database which is so strong, so solid, that every one of our life dreams and goals can be assisted through the proper use of our database.

When completed put a check or a smiley face here.

Identify Targets 1

Assignments

This is where the lessons/assignments tend to become more challenging and very critical to complete in a strong fashion. Very important to get each assignment done right or it will cost you forever.

1. Build Your Database   Goal - ___/___/____ Completed - ___/___/____

2: What Software/Technology to Use Goal - ___/___/____ Completed - ___/___/____

3: BIG is A LOT BETTER (4Q's)   Goal - ___/___/____ Completed - ___/___/____

4: Help OTHERS and Help YOURSELF Goal - ___/___/____ Completed - ___/___/____

Estimated Time To Complete

- 1 hour for each lesson for training.
- Weeks to months to follow through if done on your own usually.
- If done through a Certified Executive VA - Virtual Assistant much faster
  - Link 042 -

Assignment: **Started - ___/___/____ Completed - ___/___/____**

Signed Off: _____ ___/___/____

DETAILS - Overview - "Why Assignment Is So Important"

If you are on ActionVision these lessons are all included in your financial investment and available in your online Learning Center/My Training. Your executive coach will have these lessons activated for you at the appropriate time and then assist you to fully understand the details of the training as it applies specifically to you.

Box 1 - Identify Targets

This box is the cornerstone box for our entire BOS. What most people do not realize is that when this box is done properly, we will earn a lot more money, work a lot less hours, have less stress, and have greater life balance.

Conversely . . . when we do not do this properly we will continue to feel the cost both in dollars and time lost . . . and the worst part about it is that we will never get a monthly bill for any sloppiness so we will never really know what our lack of discipline in doing these assignments is costing us in dollars or working more hours than we should be.

NOTES

MSP Tip #1 - Worksheet

MSP - Marketing Solutions Providers have a number of different tips, suggestions, tools, templates, and resources. "Why reinvent the wheel?" These may include printed or promotional materials, specialized worksheets, examples of others who have done the work and / or referrals to individuals who can actually do the work for you. DO NOT REINVENT THE WHEEL! If there are tools / resources which are already available, use them!

Great question to ask your MSP:
What questions should I be asking that I'm not?

[ ] - Week 1: Build your database - Online Course - Link 043 -

Why is a database the heart of our business? The database is the cornerstone of your business and when you learn how to set up a powerful database, work that database, and leverage it to it's full potential, you are putting yourself on track to see some amazing results. In this 32 minute powerful lesson along with 28 minutes of Q&A you'll learn how your Life Vision, your dreams and your goals are all tied into building a very powerful database.

1. Export ALL your databases to Excel format.   - ___/___/____
   a. [   ] - From accounting software
   b. [   ] - LinkedIn
   c. [   ] - Email system we are using
   d. [   ] - Other social media: _____
   e. [   ] - CRM (Customer Relationship Management) system
   f. [   ] - MacKay 66 Interview - Link 044 - Any connections to any groups of people
   g. [   ] - Any other sources of connections
2. Develop a database organization system which will meet your short and long term goals - ___/___/____
   - Link 045 - NOTE: You will hear a great deal about MCAT as there are many people in our network who use this system. It seems . . . that whenever someone uses any other database system that it might work better for them in the short term, it may cost them less in the short term, but it always seems to cost them a lot of time, money, energy, and momentum in the long term when they use any other system other than MCAT. You are free to do so, of course, but do realize that this serves as your warning your Grandpa Chappell Principle applied. We can either learn from the mistakes/learning experiences of others or on our own.
   - Link 046 - Short recording of a client who used the 5/30 Grid for his business and then in 5 minutes, yes 5 minutes, turn his 5/30 Grid - MCAT into an advanced recruiting system.
3. In many if not most situations it is best to contract this out to a Certified Executive VA - Virtual Assistant to come in and get this done for you. They have gone through an extensive training and testing processes and will help you get it done the first time. - Link 047 - Testimonials - Overview -   - ___/___/____
4. Have your proposed database structure approved by your executive coach.   - ___/___/____
5. Import all your Excel formatted files into your new database structure.   - ___/___/____
6. Work with an E-VP (Executive Virtual Assistant) to help you profile your best clients/top prospect to determine their SIC (Standard Industrial Code) and then considering purchasing a database list which would be imported into your NEW database structure breathing new life into your business.- ___/___/____
7. Work with your executive coach to determine what type of a long term database building plan you should have in place and who will run that plan.   - ___/___/____

NOTES

Current
size of
database

Size of database I need
to achieve my WOW income goal
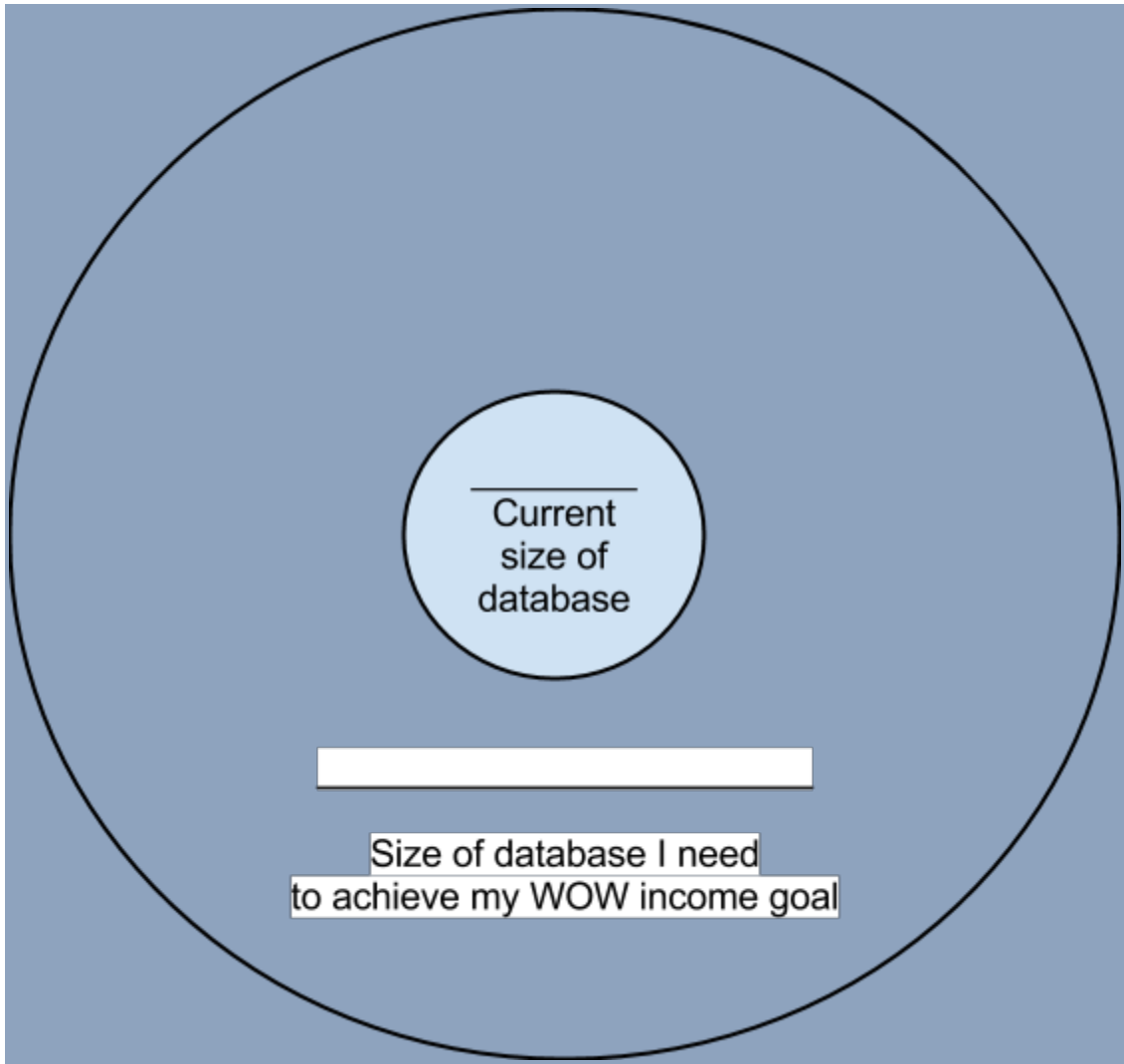
"Chart Of Accounts" - Database

In accounting, there is something called the "Chart Of Accounts" which helps to organize all the money coming in and going out. Why is this so important? The better organized we are in the financial areas the more money we will make and the less hours we will have to work to make that money. We will know what is working and what's not.

If we need to do that with our money then how much more true is it with our database of our prospects - clients - and referral partners, vendors, and really everyone we know?

The foundation, the heart of our business is our database and if we have a strong organization / structure then we will generate more and better leads. Let's say we have 1,000 people in our database. If we have a strong organizational / database structure we will probably produce 50% or maybe 100% or even more in business if we work that organized database in the right way.

What are the five or "x" major areas for you database? We'll call this Database Level 1.

_____   _____   _____

_____   _____   _____

_____   _____   _____

_____   _____   _____

_____   _____   _____

Level 2 are sub database under the Level 2 categories. This gets a little tricker. Talk with your executive coach and/or mastermind for additional details for this. You can have as many sub level groups as you wish. The MCAT system is the best structured database system we have seen. As you get into Box 2: Develop & Deliver A Message, you will see the critical importance of putting this proper foundation in place. One of the most amazing aspects of the MCAT system is that you can send to one sub sub sub group or send to the overall group and it will take care of everything for you.

_____ Level 1 database

    _____ Level 2

    _____

        _____ Level 3

        _____

            _____ Level 4

    _____

As you'll see with the MCAT system, thinking out into the future has it's rewards. The 5/30 Grid will handle any product / service line for generating revenue, in any industry. If designed properly with the right technology you will also be able to use the same BOS - Business Operating System for all your hiring needs, vendor relationships, partnerships, community based efforts/partnerships and anything else that has to do with people and/or money.

There are many things taught in this workbook, The Golden Triangle, that may not make full sense, and / or you will not fully realize the reasons for doing what we recommend.

At some point in the future, the light bulb will go on, and you, as most people, will kind of kick themselves and say "Why didn't I trust the integrity of the system." Our job is NOT to convince you to do anything it's to help you understand intellectually what the best way to do something is and then you get to decide. If you **"Trust the integrity of the system,"** as Tom is so fond of saying, then you will gain the benefit of that trust. If you don't . . . you will gain the benefit of the hard lesson of learning the importance of "Trusting the integrity of the system." Either way, you'll win.

We also need to have the same structure, we use for grouping people together to be used for Promotions - Marketing - Training - and AP's (Automated Processes). You will see the massive value in this throughout the rest of the entire 5/30 Grid training.
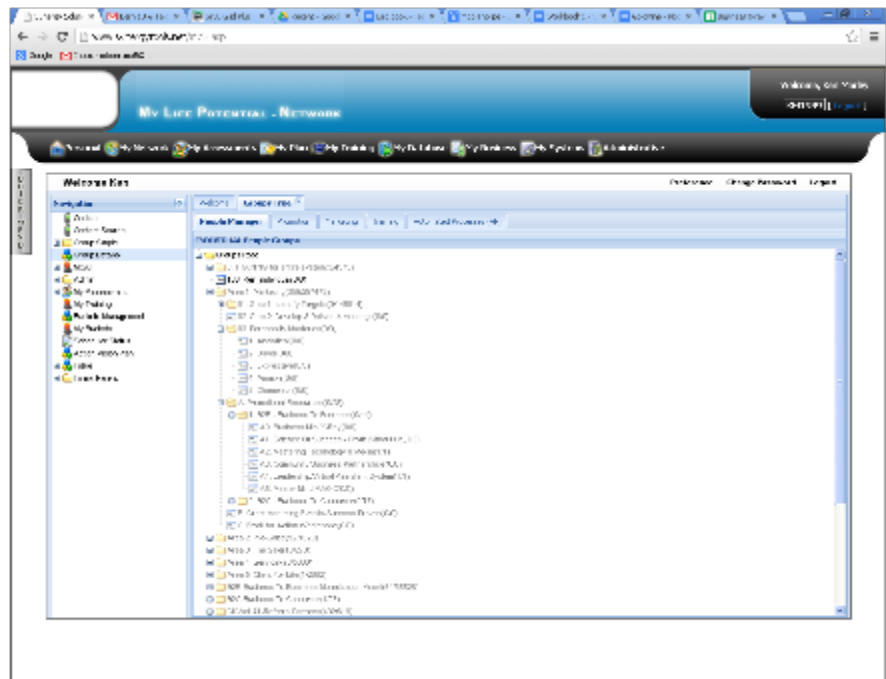
Pressure Point Analysis

If we do not know the size of the database we need to have to achieve our WOW income goal and work the number of hours we desire to work, we can complete a pressure point analysis. Complete the steps required

xx% in Orange = Averages many people will use if not sure as to what their %'s are.

1. WOW Income/Sales Goal $_____

2. Average Sale/Profit per sale $_____

3. Average # of units needed   _____   (#2 / #1 = #3)
       Pressure Point #5 (PP5)   _____%   **85%**   (% of people we sell which close)
4. Units needed to sell   _____   (PP5 / #3 = #4)
       Pressure Point #4 (PP4)   _____%   **10%**   (% of people make presentation to close)
5. Presentations we need to do   _____   (PP4 / #4 = #5)
       Pressure Point #3 (PP3)   _____%   **15%**   (% of people we talk to we do presentation)
6. Number of people we need to talk with   _____   (PP3 / #5 = #6)
       Pressure Point #2 (PP2)   _____%   **20%**   (% we call that we will talk with)
7. People we need to get to raise their hands _____   (PP2 / #6 = #7)
       Pressure Point #1 (PP1)   _____%   **3%**   (% of those in our database who will respond)

8. Size of database needed   _____   (PP1 / #7 = #8)

[   ] - Week 2: What Software/Technology to Use - Online Course - Link 049 -

Having the right database is a great start but then we need to work that database. It's kind of like being in a car race against your competition and not having the fastest/best car. The right technology will save us so much time, effort and will also help us to earn more money, work fewer hours and have less stress. Don't miss this lesson in putting the right foundation in place. 31 minutes of power-packed information along with 24 minutes of Q&A make this an invaluable lesson that is a must view/learn/apply for every business professional.

1. We strongly recommend MCAT in most situations for a number of reasons. If you already have another system in place which you are deep into, using it will, have the database organized, are marketing on a consistent basis, and really making money based on actively working your database then by all means continue to use it. If not, we strongly recommend MCAT!   - ___/___/____

As we go deeper into the 5/30 Grid, things will make so much more sense to you as to why MCAT is so strongly recommended.   There are so many horror stories of companies who went with an off the shelf solution and really paid for it in the end OR who created their own customized system that didn't work for them as well.

Every month, every year, every presentation there is more and more evidence that MCAT will not only meet your needs in the short term but will also in the long term as well.

NOTES

MSP Tip #2 - Worksheet

MSP - Marketing Solutions Providers have a number of different tips, suggestions, tools, templates, and resources. "Why reinvent the wheel?" These may include printed or promotional materials, specialized worksheets, examples of others who have done the work and / or referrals to individuals who can actually do the work for you. DO NOT REINVENT THE WHEEL! If there are tools / resources which are already available, use them!

Great question to ask your MSP:

Can you or someone you know help me set up and structure my database to save me time, energy, money and help me to do it right the first time?

[   ] - Week 3: BIG is A LOT BETTER (4Q's) - Online Course - Link 050 -

What's more important, a large database (quantity) or a great database (quality)? Actually . . . . it's both! In the 31 minutes of this lesson, you'll learn the key aspects of building a database that has both quantity and quality. Think about it . . . what would your business be like if you had a large database of high quality prospects, clients, and potential prospects. In addition to the 31 minute lesson this also comes with 30 minutes of Q&A of individual business professionals who are actually working on building the quantity and quality of database which will help them achieve their goals.

1. The 4 Q's will help to prevent you from investing a lot of money into lead generation, feeling great about myself, but not turning it into dollars. Do I deeply understand and buy into the 4 Q's - [   ]-Yes // [   ]-No
   - ___/___/____

2. Do I feel I am really using my entire network to it's full potential? Have someone complete the MacKay 66 on me and then share my recorded session with others to see where my world might help others and others world might help mine. - Link 051 -   - ___/___/____
   NOTE: To give you an idea of the depth of the 5/30 Grid and how you will invest a lifetime learning to master it, the above link is actually taken from Box 27 which is a Level 6 in Sales - Penetration vs. Expansion. If we don't know how to do it for ourselves, how are we going to be able to do it for others?

3. Review over with my executive coach for ideas and specific strategies as to how I can fully leverage my entire network, my vision, my passions, my experiences to help me and others around me to see amazing success.   - ___/___/____

4. Do I want to apply the SIC research I did earlier into targeting very large databases?   - ___/___/____

We will find out, in painful details, how we are only as strong as our Quantity OR Quality. A large part of Quality is the ability to target a very specific message to a very specific group of people. Getting this lesson right the first time will save us a great deal of heartache as we move forward.

NOTES

What are the five largest groups of people you have some connection with. Could be business network, community group, college, social, etc.?

_____

_____

_____

_____

_____

Write down your key connections of influence within each group and what the biggest challenges are for those who participate within the group.
"What can I do to bring value to specific groups?

[   ] - Week 4: Help OTHERS and Help YOURSELF - Online Course - Click Here -

In this amazing lesson, you'll learn how one company took 20 years to build a database of 110,000 and then in just 15 minutes, through the leveraging of a partnership, took their database to over 1.1 million. When you learn the value of what you really do have to offer and how to make that offer to other referral partners, you can accomplish more in minutes than most businesses accomplish in years or even decades. 30 intense minutes of training and 31 minutes of Q&A.

1. We have alluded to this in previous lessons/assignments and the time has come to actually put this in place. If you desire to grow amazingly quick in this area contract with an E-VA to use your 5/30 Grid as a Profitable Partnership system - special advanced session Link 52 - to build your own system to develop Profitable Partnerships.   - ___/___/____
   NOTE: You do not have to build an entire system and it might be best for you not to do that at this time. This is where your executive coach can provide additional insight specific to you to insure that you aren't taking on too much or leaving opportunity on the table.

   - special advanced session - Link 053 -
   Are advanced sessions which combine the 5/30 Grid with other Natural Laws, systems, etc. These sessions ARE NOT included in your ActionVision coaching program. These sessions are specially created for individuals who are the actual builder and implementer of the finished system. Very often the business owner / leader is the last person in the world who should be going through these specialized training sessions as they will NEVER make the time to implement what they learn and probably never should.

   These special sessions should be usually completed by employees or better yet, in most situations, E-VA's who have already been certified in learning what to do and then has gained the invaluable experience of actually implementing the systems. The MSP - Marketing Solutions Provider 1, 2, 3, or 4 year program is a systematized way of going through many to all of these sessions in a strategic fashion. - MSP - Link 054 -

2. Another advance strategy that you may be able to assign to an employee or an E-VA is partnering up with a chamber of commerce, an association, or a community based organization. Again please check with your executive coach for the best precise actions you should be taking. - Link 055 -   - ___/___/____

Are you overwhelmed yet? If you answer "Yes" to that, then you are with the majority of people who see the 5/30 Grid as simple, but very quickly see under the hood as to the true genius / brilliance. If you've thought you have been through anything like this in the past, we're guessing that you now know you have not.

Yes, all this is just Box 1: Identify Targets.

If you're the type of person looking for a fairytale solution "One where you don't have to do much work, one where it comes out of nowhere, you don't have to invest money, time, or effort and you can have your cake and eat it too," we are pretty sure that if you have made it this far, you realize that there is no such thing.

The real magic to this is that the entire 5/30 Grid + Personality Masteries foundation to your own BOS is designed to take you, wherever you are, at whatever budget of time and money you have and build on that. Even if you only have $50 to invest, we believe that if you invest that $50 properly that you will then produce $500 and then $5,000, $50,000, $500,000, $5,000,000 and it will continue to grow as you continue to invest the appropriate amount of money back into your business and YOU DO NOT steal valuable time, dollars, energy, or focus at key times in the development of your company.

NOTES

MSP Tip #3 - Worksheet

MSP - Marketing Solutions Providers have a number of different tips, suggestions, tools, templates, and resources. "Why reinvent the wheel?" These may include printed or promotional materials, specialized worksheets, examples of others who have done the work and / or referrals to individuals who can actually do the work for you. DO NOT REINVENT THE WHEEL! If there are tools / resources which are already available use them!

Great questions to ask your MSP:

Could you review over my list of potential influential businesses/people/organizations who I may be able to help them, and they me? Do you know where I can purchase databases from which to build my database / targets faster and larger?

Now comes the tough part . . .

"Should I move to Box 2 - Develop & Deliver A Message or should I invest into more advanced lessons and training?"

- Link 056 -

What do you get when three world thought leaders get together . . . - Overview
Some very interested in things without a question. Tom, Mike, and Mark all have some very interesting world experiences that help them all to see things in a little different light. Take their three perspectives and combine it with the 5/30 Grid and you will gain some very interesting insights into business, making more money, working less hours, having great balance in every area of your life, and how to use/leverage systems to do this faster and more effectively. In today's session we get started with the corner stone of every business which is "Identify Targets" Box 1 of the 5/30 Grid. It's getting our database whipped in shape to position it to be a tool which will change the way we do business forever.

That is a great question and one which you probably should run by your executive coach. In most situations you should move on to Box 2 now. Over time, you will swing back around to look again at Box 1: Identify Targets and each and every time you do, you will learn so much more and wonder "Why didn't I pick that up the first time I went through it?"

We have found it to be good to do some reflection after you complete each box. We have gone through so much and we need to apply the 80/20 Principle and seek to find the 20% of those things we've learned that we need to apply today. The faster we apply what we learn the more deep knowledge we'll have as we learned early on, surface knowledge comes from going through the lessons while **deep knowledge comes from doing**.

NOTES

[ ] - Lesson 6-2. Box 2 - Develop & Deliver A Message

Purpose - <u>Members Only Link A05</u> -

Implement messaging/communications systems which are so powerful that we develop the right message, to the right person, at the right time to produce the Quantity and Quality of leads to achieve our company goals.

Assignments

This is where the lessons/assignments tend to become more challenging and very critical to complete in a strong fashion. Very important to get each assignment done right or it will cost you forever.

1. Develop & Deliver A Message   Goal - ___/___/____   Completed - ___/___/____
2. Measuring/Producing Results   Goal - ___/___/____   Completed - ___/___/____
3. Read & Apply "Made To Stick"   Goal - ___/___/____   Completed - ___/___/____

Estimated Time To Complete

- 1 hour for each lesson for training.
- Weeks to months to follow through if done on your own usually.
  - If done through a Certified Executive VA - Virtual Assistant much faster - <u>Link 057</u> -
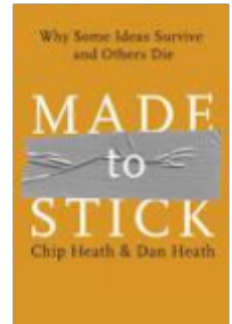
Assignment: **Started - ___/___/____**   **Completed - ___/___/____**

Signed Off: _____ ___/___/____

DETAILS - Overview - "Why Assignment Is So Important"

Imagine . . . how by changing just one word could double your income. Most would say that is impossible but when you think about the message and the millions of dollars that are invested in just a few words. How many millions of dollars do you believe McDonald's invested into "i'm lovin' it" brand?

What's challenging about true, deep, huge success is that there are many factors which create success and it seems that we are only as successful as our weakest link.

We often tire at some point in our learning/doing which creates a weakness, a "Gap Of Excellence" let's call it in our BOS. Often this is in the area of "Develop & Deliver A Message." We do not realize the value, importance, the power of one word, one phrase, one way to look at things.

This workbook is designed to help be a road map to getting the most from the 5/30 Grid. There is so much which could be focused on in our business, in the 5/30 Grid. The key to success is to make sure that we are focused on the right things, at the right time. If we are focusing on the right activities, whatever time, energy, and dollars are being invested into those things, we will see a return in both time and money i.e. the "3 for 1 Principle" applied.

If we are proper stewards of those results (5 T's To Stewardship - Link 058) we will continue to have the resources to invest into "The Next Steps."

NOTES

MSP Tip #4 - Worksheet

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Great questions to ask your MSP:

Do you have access to any libraries, templates, email programs/systems, or anything else which would be of help to me in getting consistent messages out to the groups / databases of people I have / am building? Do you or someone you know have experience in writing great copy?

Box 2 - Develop & Deliver A Message

[   ] - Week 1: Develop & Deliver A Message [Click here to download a marketing checklist](#)

What good does it do if you have a high quantity sized database with strong quality of leads if you don't connect on a consistent basis? You are correct if you said "zero" good. Most businesses do not have strong databases and many who do, do not work their database in an effective/profitable manner. Did you know that one word change, one concept presented, one small phrase modified can double the results of your leads coming in? It's hard to imagine what can really be learned in 31 minutes. This is a lesson you probably will want to go through more than once, it is so powerful. 30 minutes of Q&A brings this lesson to the finish line. - Link 059 -

1. Do I really / deeply understand my targeted audience?   - ___/___/____
2. If you said "Yes" to #1, are you sure?   - ___/___/____
3. If you completed your Box 1 assignments correctly in this workbook you will have a strong system in place for properly targeting specific groups of people in your database. As we get deeper into the 5/30 Grid we will learn how specific groups of people need to be sold to in very different ways. If this is true, which every sales professional would agree with, then it stands to reason that people need to be marketed to / communicated based on unique factors.
    - Are we sure we have groups are targeted databases properly and know them well?   - ___/___/____
4. In "Made To Stick" there is a checklist for 6 things we need to consider when writing copy.
    - Did, we take notes on those six things?   - ___/___/____
    - Did we create a sub checklist for each of the items.   - ___/___/____

Yes . . . this is worse than school as you will get tested and you will get a grade, but "No" you probably will often not be clear as to what that grade is. While it's always good to have the owner/leader do some of this work without question so there is an understanding on how challenging this is, in reality, do we really think that the owner/leaders will be doing this? Probably not. In most situations the fastest way to do this and do it "right" is to hire an E-VA who has been certified in developing and delivering the message, at least for the short term.

COACHING TIP: When you do get an "expert" doing this work, do be very careful if they think they really do know a lot. The more one knows about this area the more one knows they do not know. If you are doing email marketing then the best way to know is to "DO." Some of the best people to really know copy and what will grab people's attention are those individuals in "**Area 2: Pre-Sales**" and "**Area 3: The Sales**."

In further lessons/boxes we'll learn how to fully integrate all five areas together and all 30 boxes into one symphony where we leverage the gifts/strengths of each area/each box for the maximum benefit of the entire team.

NOTES

[   ] - Week 2: Measuring/Producing Results - Link 060 -

How do you really know if you are successful if you aren't measuring all your efforts and results? In this amazing lesson, you'll learn not only the value of tracking key numbers but also how to leverage that data for even greater success. The faster you know if your activity is working, or not working, the faster you can make the proper business modification to see the success you so desire. 31 Minutes of training/coaching that covers hours of content presented in a powerful way. The 29 minutes of Q&A will help you to understand the content/truths being presented.

1. Work with your executive coach/MSP/mastermind group to determine pressure points.   - ___/___/____
2. There are more ways to develop and deliver a message than ever before. We can send the message through traditional mail, use TV, radio, internet, text, and/or email to name a few. What works best? There are so many factors that it honestly can be hard to know what really is most effective. What is almost always true is that leveraging the strengths of each of the different methods and combining the various methods together will often produce 10 times or even 100's of times better results.

   With the internet and all the technology that is now available we are able to measure the various steps better than ever before. If we are not using technology to better discover what works and what does not we are missing opportunities.
   - Do I have systems in place to measure our efforts and results for all our marketing efforts?

   - ___/___/____

   - Do I have technology in place to measure open and clicks for all emails sent?   - ___/___/____

NOTES

MSP Tip #5 - Worksheet

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Great question to ask your MSP:

Could you or someone you know help to review my key numbers from my marketing efforts and assist me to find better databases, better segment my databases and / or generate more and better leads?

The following lesson is an advanced lesson. You may choose to go through this or come back to this at some point in the future.

Three thought leaders share some amazing things. - Overview - Link 060b -

It's always exciting to learn something new. It's even more exciting when we take action on what we learn and make money from the application of that knowledge. Tom, Mike, and Mark, not only share the the critical importance of learning how to develop and deliver a message but you'll also experience a special part of the session where they just do it. You could actually take that segment of what they've done and use it to build resources by partnering up with colleges/students to help the students learn and gain access into the market place and will help you grow you business without any costs. This session could give you a lot more resources without increasing your costs at all. We also cover the "Point of Entry" Principle in detail as well as how to integrate Box 1 - Identify Targets in the best possible way with Box 2 - Develop and Deliver A Message.

[ ] - Lesson 6-3. Box 3 - Track 100% Of Leads

Track 100% of leads 3

Purpose

To track 100% of the leads coming in and direct the best leads to Area 3: The Sales, continue to work in Area 2: Pre-Sales those leads we should, and then provide valuable feedback to Area 1: Marketing to assist in generating more and better leads.
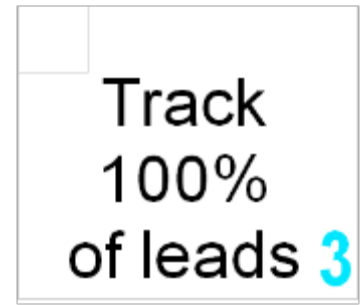
Assignments

If we selected the right technology much of the heavy lifting will be done through the right technology.

1. Determine what 1 to 10 quality of lead means   Goal - ___/___/____ Completed - ___/___/____
2. Determine path the leads will travel   Goal - ___/___/____ Completed - ___/___/____

Estimated Time To Complete

- 1 hour for each lesson for training.
- Weeks to months to follow through if done on your own usually.
- If done through a Certified Executive VA - Virtual Assistant much faster
  - Link 061 -

Assignment: **Started - ___/___/____   Completed - ___/___/____**

Signed Off: _____   ___/___/____

DETALS - Overview - "Why Assignment Is So Important"

Box 3: Track 100% of leads can be deceptive. We often might ask ourselves *"How hard can it be to track leads?"* Actually . . . it can be very challenging to know what information to track, how to track that information and what to do with that information once it's tracked.

Another roll that Box 3 plays is the air traffic controller for the leads at point of entry. *"Should the lead be passed directly to sales OR should the lead be worked on in pre-sales?"*

Often if the lead is a "7" or above it gets pass to Area 3: The Sale and if it is less than a "7" it will be kept in Area 2: Pre-Sales and Box 5: Implement 10+ Strategic Strike will take the lead over and work it for some period of time.

There are a number of reasons this process works so well. When a lead is in Pre-Sales we are working to move them from something less than a "7" up to a "7" or greater. This takes nurturing to do so which is why often the "Amiable" or the "Analytic" personality usually will do a much better job in Area 2: Pre-Sales, where as the "Driver" or the "Expressive" personality types will often do better in Area 3: The Sale. Often the Driver/Expressive personality will tend to close a lot faster, ask for the sale, be more comfortable in overcoming objections, etc. which is what we want/need those in sales to do.
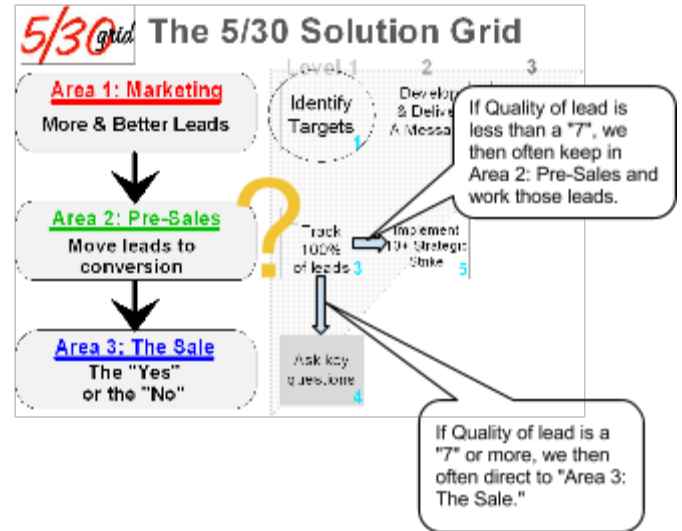
Being clear as to what constitutes a "10" in quality lead and/or a "3" is important. If we give our sales people leads which are less than a "7" we will often burn our sales people out or will cause them to close a lead when they should not and not close a lead when they should. If we do not have the ability to nurture leads of less quality than a "7" we actually should talk to Area 1: Marketing and see what we can do to prevent from "catching" those leads in the first place. It is better to not catch a lead if we are not able to work that lead in a proper way.

Our goal, in Area 2: Pre-Sales is to move lower quality leads into higher quality leads. The better, the faster, we are at that, the higher our sales closing ratio will be. Most companies believe that we need to double our leads to close more sales, when it is often ten times easier to increase our sales closing ratio by just closing one more out of ten.

Having a strong understanding of the 4 Q's to doubling our success - Link 062 - helps us to understand the importance of making sure that we cover these assignments well.

Define, as best as possible, what each level (Quality) of lead would look like. In more advanced sessions/coaching developing a detailed strategy on how to move each level of lead to a higher lead will not only help us to convert more leads but will also help us to convert them faster and with less overall costs.

As detailed description as possible . . .

10 - _____

9 - _____

8 - _____

7 - _____

6 - _____

5 - _____

4 - _____

3 - _____

2 - _____

1 - _____

FUTURE INSIGHT . . . We will learn, in the future that often those leads which are 7 to 10 will often be strong influencers "The Cluster Principle" - Link 063 - of leads which are lower quality. When we capture the experience of higher quality leads, which turn into clients, we will then have a system which will nurture lower quality leads into higher quality leads.

Box 3 - Track 100% Of Leads

[ ] - Week 1: Track 100% of Leads - Link 064 -

How hard is it to track a lead properly? It would seem like it's a pretty easy process, when in fact it's not. In 32 minutes, natural laws, systems, and processes are shared in a way that will help you to not only understand at the surface level but to help motivate you to track 100% of your leads . . . forever! 28 minutes of Q&A helps you learn from the experiences of others and will help to motivate you to take action.

1. List out all the key data/information we believe we should be tracking once the lead/target in our database raises their hands and says "I'm interested."   - ___/___/____

   [ ] - a. Where do the leads come from?
   [ ] - b. What caused them to raise their hands - triggered them to take some type of action?
   [ ] - c. Level 1 Questions - Get them interested in us - their pain - their personality
   [ ] - d. Level 2 Questions - Determine if we are interested in them. Do they qualify?
   [ ] - d. Level 3 Questions - Key information to determine how best to present solution.

2. Box 3: Track 100% Of Leads & Box 4: Ask Key Questions work very closely together and often Pre-Sales will do as many of the asking of the key questions as possible. There are usually up to four levels of questions which are asked and often Level 1 and 2 questions are asked in Pre-Sales to determine precisely the quality of the lead as well as to best position sales to quickly close the sale.
   - Very valuable **members only** information - spreadsheet - detailed document -
     NOTE: To best determine this we may need to do Box 4: Ask Key Question to fully understand this assignment.

   [ ] - a. Do we want Area 2: Pre-Sales to obtain Level 1 Questions?   - ___/___/____
   [ ] - b. Do we want Area 2: Pre-Sales to obtain Level 2 Questions?   - ___/___/____
   [ ] - c. Do we want Area 2: Pre-Sales to obtain Level 3 Questions?   - ___/___/____

[ ] - Week 2: Quality Of Efforts - Link 065 -

Often . . . if you can just tweak your marketing, your pre-sales, just a small amount, you can convert just 1 additional lead out of 10. This one small tweak could double your sales, without any additional leads, without spending any additional money. If it was easy, you probably would have already done it. What's nice is that when you know the right actions to take, in the right way, at the right time, with the right people, systems, and processes, you can change the way you do business forever. A 29 minute lesson with 30 minutes of Q&A.

1. Are we treating each lead based on his/her "pain" / "area of need" and fully integrating that into the personality of the prospect. Quality of efforts is "How well we handle the leads the instant they raise their hands."

[ ] - a. Do we have a rock solid "Point Of Entry" for 100% of leads?   - ___/___/____
[ ] - b. Do we handle leads in a different way based on their personality?   - ___/___/____
[ ] - c. Do we always ask the same questions and follow a detailed process?   - ___/___/____
[ ] - d. Are we plugging our success stories back into our pre-sales process?   - ___/___/____
[ ] - e. Are we building a bridge between their pain/pleasure and our solution? - ___/___/____

NOTES

Bridge Building

When we build a bridge between someone's challenge or what they would love help on, to our product/service, we increase our sales, reduce our sales cycle, reduce the time we work, reduce our stess, and increase our life balance.

People want to move away from their pain and move toward things that bring pleasure.

Where Someone Would Like To Be

3. Implementation
   - Ask for the sale
2. Solutions
   - What willing to do?
   - Benefit to your life?
   - When?
   - Do you want a solution?
1. Examination

BC Know
Like
Trust
Truth
Stories
Mirroring
Learning Styles
Personality Masteries
Natural Laws

Challenges
Love Help
Where Someone
Is Current At

Factors To Stop/Move To "Yes"
1. Is "Pain"/"Pleasure" strong enough?
2. Past history/patterns
3. Sense of urgency
4. Decision Maker
5. Ability to make investment
6. Trust - Does individual believe our solution will be the bridge?
   (Trust built largely in Examination Phase)

Shorter Sales Cycle

If we say cold leads are "green" apples and hot leads are "red" apples and the time it takes to move from green to red is the sales cycle, it's in everyone's best interest to shorten that sales cycle as long as we have the good/great solution.

Tom Kunz

A Marketing Model . . .

Time To Make A Decision

1	2	3	4
Would Be Nice	Because	1st Time conscious thought	Contact With Industry
	Justification	Filters	
Sub-Conscious	Sub-Conscious	Conscious	Conscious

Reduce Sales Cycle Time
Helping people (the student) realize there is more they could have in life / business if they were to embrace: *"Whatever the mind can conceive and believe, it can achieve."* Napoleon Hill

- Personality Masteries
- Strategic Strike
- Seed Reproduction Model
- "How To Motivate People" Stories to create belief
- 5 H's To Success
- 5 T's To Stewardship

7 Magic Phases To Close A Sale

MSP Tip #6 - Worksheet

MSP - Marketing Solutions Providers have a number of different tips, suggestions, tools, templates, and resources. "Why reinvent the wheel?" These may include printed or promotional materials, specialized worksheets, examples of others who have done the work and / or referrals to individuals who can actually do the work for you. DO NOT REINVENT THE WHEEL! If there are tools / resources which are already available use them!

Great question to ask your MSP:
Am I missing anything as it relates to tracking 100% of my leads?

[ ] - Lesson 6-4. Box 4 - Ask Key Questions

Purpose

To learn how to ask questions which help people to discover that your solution is the best solution for the challenges/problems they face.

Members Only information - spreadsheet - detailed document

Assignments

Learning to ask the best questions is as much an art as it is an assignment. We will learn how to sell as a result of asking the best questions.

1. Write out Level 1 Questions -   3 minutes long Goal - ___/___/____   Completed - ___/___/____
2. Write out Level 2 Questions - 11 minutes long Goal - ___/___/____   Completed - ___/___/____
3. Write out Level 3 Questions - 16 minutes long Goal - ___/___/____   Completed - ___/___/____

	[Box 4] Ask Key Questions - 4 Levels of Questions			
Minutes	30			
Minutes	3	11	16	30
Level of Questions	Level 1	Level 2	Level 3	Level 4
Overall Objective	Get them interested in you	Determine if they qualify to work with you	Through questions build a bridge between their biggest challenge and your solution,	Usually applied with the amiable and analytical personality types to build relationships and trust through data/information and taking time,
Types of Questions	Standard B2B Questions	Customized questions to achieve very specific goals	Questions which help the prospect to best understand that your solution is the best one for them.	Questions and discussion which build connection/relationships (Amiable) and covers all the important data to build trust with the analytical.
??? Questions ???	ANSWERS			
What about personality types? How does that affect the questions / approach?	We can use the same questions in most situations, but will ask the question in a different way, Our voice - tone - pitch - speed - words we use would change depending on the personality type of individual we are selling to,			

Estimated Time To Complete

  - 1 hour for each lesson for training.
  - Weeks to months to follow through if done on your own usually.
  - If done through a Certified Executive VA - Virtual Assistant much faster - VA link -

Assignment: Started - ___/___/____   Completed - ___/___/____

Signed Off: _____   ___/___/____

DETALS - Overview - "Why Assignment Is So Important"

Most sales professionals act as if the sale is made in Box 8: Master Present Solutions, when in fact the sale is actually made in Box 4: Ask Key Question. As a matter of fact if you get a prospect to say "That's a great question!" three times they will generally buy anything.

Intro	Level 1	Level 2	Level 3	Level 4
The Lead In	Get them to like you 3 Min	Prequalify prospect 11 Min	Gather data to close the sale 16 Min	Applied often to amiable and analytic who need to take more time to build relationship 30 Min
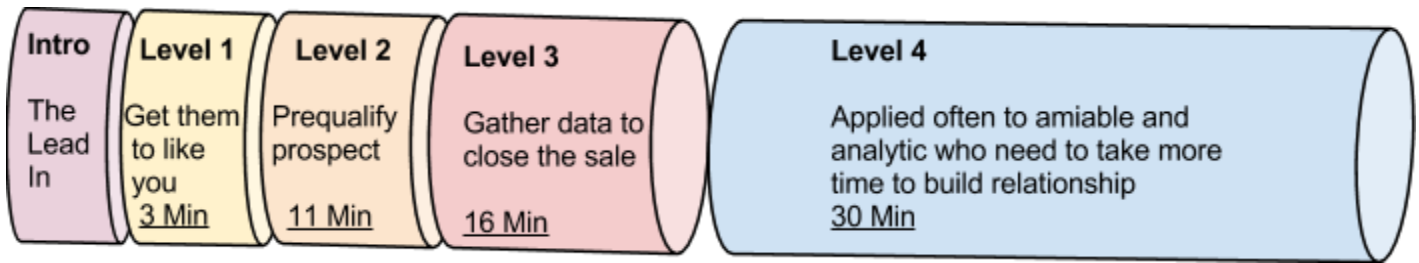
As we perfect our questions we become far more disciplined in our approach and, over time, we will become a sales machine. As we discipline ourselves day in and day out, we discover how small changes in the questions, the order, how we present, affect how they work on different personality types so that we can give the best presentation in the shortest amount of time and produce the best results.

We also will learn how to use systems to complement our presentation and reproduce ourselves.
NOTE: This is a journey, not a destination. This will take some time to perfect and even after ten years of using the same presentation, we will continue to learn how small tweaks will produce better results in less time.

Box 4 - Ask Key Questions

	[Box 4] Ask Key Questions - 4 Levels of Questions			
Minutes	30			
Minutes	3	11	16	30
Level of Questions	Level 1	Level 2	Level 3	Level 4
Overall Objective	Get them interested in you	Determine if they qualify to work with you	Through questions build a bridge between their biggest challenge and your solution,	Usually applied with the amiable and analytical personality types to build relationships and trust through data/information and taking time,
Types of Questions	Standard B2B Questions	Customized questions to achieve very specific goals	Questions which help the prospect to best understand that your solution is the best one for them.	Questions and discussion which build connection/relationships (Amiable) and covers all the important data to build trust with the analytical.
??? Questions ???	ANSWERS			
What about personality types? How does that affect the questions / approach?	We can use the same questions in most situations, but will ask the question in a different way, Our voice - tone - pitch - speed - words we use would change depending on the personality type of individual we are selling to.			

NOTES

MSP Tip #7 - Worksheet

MSP - Marketing Solutions Providers have a number of different tips, suggestions, tools, templates, and resources. "Why reinvent the wheel?" These may include printed or promotional materials, specialized worksheets, examples of others who have done the work and / or referrals to individuals who can actually do the work for you. DO NOT REINVENT THE WHEEL! If there are tools / resources which are already available, use them!

Great questions to ask your MSP:

What do you think about my Level 1 to Level 4 questions? Are they producing the interest, the excitement the positioning to help me close a higher percentage of my prospects into clients?

[　] - Lesson 6-5. Box 5 - Implement 10+ Strategic Strike

Purpose

Influence the decision making for prospects to help them to see the benefits / build a bridge between their challenges / problems and the solutions (products/services) we have.

Implement 10+ Strategic Strike 5

Assignments

1. Build a 10+ touch campaign <u>outline</u>.　　Goal - ___/___/____　Completed - ___/___/____
2. Box 13: Determine <u>why</u> prospects are lost.　Goal - ___/___/____　Completed - ___/___/____
3. Box 12: Connect <u>successes</u> into Box 13.　Goal - ___/___/____　Completed - ___/___/____
4. Flesh out <u>details</u> for each strike/touch.　Goal - ___/___/____　Completed - ___/___/____

Estimated Time To Complete

 - 1 hour for each lesson for training.
 - Weeks to months to follow through if done on your own usually.
 - If done through a Certified Executive VA - Virtual Assistant much faster - Link 066 -

Assignment: 　**Started - ___/___/____** 　**Completed - ___/___/____**

Signed Off: _____ 　___/___/____

DETAILS - Overview - "Why Assignment Is So Important"

If we can just convert one more out of ten, it can often double your income.

Box 5 - Implement 10+ Strategic Strike

Week 1: Implement Strategic Strikes - Lesson 1 - Link 067 -
Did you know that, based on a number of university studies, the average number of contacts it takes to make a sale is between 6 and 10? The amazing part of this is that those same universities studied sales professionals and found that the average number of contacts a sales professional makes is between 1 and 2. If it takes 10 contacts to make a sale, and you only make 9, how much do you get paid for doing 90% of the work? Zero! This lesson can transform the way you do business and by learning how to put the right systems in place you can start to get your business to run without you. This 31 minute lesson with 28 minutes of Q&A will put the foundation in place for part 2 of the lesson.

Sequential — Done in a specific order
Quantity 1 2 3 4 5 6 7 8 9 10
Quality % 1 2 3 4 5 6 7 8 9
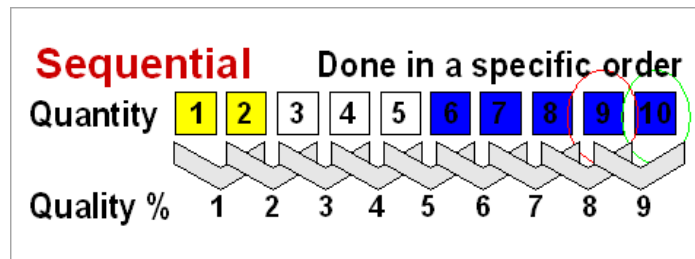
Action   Goal of action

1. _____   _____

2. _____   _____

3. _____   _____

4. _____   _____

5. _____   _____

6. _____   _____

7. _____   _____

8. _____   _____

9. _____   _____

10. _____   _____

Week 2: Strategic Strike - Lesson 2 - [Link 068](#) -

The Strategic Strike is probably one of the most difficult boxes to do in the 5/30 Grid. It requires so much knowledge, some very powerful technology, and a great deal of discipline. Learn how to use natural laws along with personality masteries to put a system in place which will touch every prospect you ever have 10+ times, forever, without you doing any work. A 31 minute lesson along with 27 minutes of Q&A makes this a lesson you will not forget.

NOTES

MSP Tip #8 - Worksheet

MSP - Marketing Solutions Providers have a number of different tips, suggestions, tools, templates, and resources. "Why reinvent the wheel?" These may include printed or promotional materials, specialized worksheets, examples of others who have done the work and / or referrals to individuals who can actually do the work for you. DO NOT REINVENT THE WHEEL! If there are tools / resources which are already available, use them!

Great questions to ask your MSP:

Is this box really one of the hardest boxes in the whole 5/30 Grid to do? Do you have templates, systems, and/or people who could help me do this so I don't have to take years to learn how to do this myself? Should I or someone on my team go through the seven week course - Prospect Conversion System?

[ ] - Lesson 6-6. Box 6 - Group People & Messages Together

Purpose

To save time, earn more money, work less hours, and have less stress in our lives as a result of a well organized database and effective messages which are delivered to the right targets, at the right time, in the right order producing the required number of leads we as a company need to achieve our overall vision.

Group People & Messages 6

Assignments

1. Map out people/message outline   Goal - ___/___/____   Completed - ___/___/____
2. Determine what dimension we are in   Goal - ___/___/____   Completed - ___/___/____
3. Implement outline/strategy   Goal - ___/___/____   Completed - ___/___/____

Estimated Time To Complete

- 1 hour for each lesson for training.
- Weeks to months to follow through if done on your own usually.
- If done through a Certified Executive VA - Virtual Assistant much faster - Link 069 -

Assignment: **Started - ___/___/____**   **Completed - ___/___/____**

**Signed Off: _____   ___/___/____**

DETAILS - Overview - "Why Assignment Is So Important"

As our business grows we go to new dimensions. Understanding The *NEXT* Dimension Principle - Link 070 - is critical to achieve our overall vision. Why? If we do not deeply understand this principle we will get stuck in our current dimension? Why? There are many reason for getting stuck, one of which it's just safer, meaning we do not have to grow, we do not have to take new risks, we do not have to "fail."

There is nothing wrong inherently with staying where we are if that is where our Life Vision, our purpose in life has for us . . . UNLESS . . . the world around us changes . . . which it always seems to, doesn't it?

A great example would be, let's say, a 10 million dollar company. It could be any company but we'll use a printing company for example. Whatever that printing company has been doing to get to 10 million and maintain that 10 million, as the marketplace changes, as technology changes, as the world and the economy change if the printing company does not change that same 10 million dollar company may only be able to do 9 million in two years with all the changes in the marketplace and 8 million the next year.

Those who jump to new, higher dimensions will be greatly rewarded.

If the printing company has a 10% profit margin then dropping below 9 million is serious enough to where that business, without major changes probably will go out of business. Now, lest we think this is true just with a printing, manufacturing company, or technology company, then we are not paying attention. Even service industries such as architecture, engineering, medical, and accounting practices are being affected both by technology and the ever expanding reach of the world economy.

If I were to ask you what is a higher number a "2" or a "9" most individuals would say a "9" of course. Let's say that each dimension, including the dimension we are currently in goes from 1 to 10 with 10 being the highest level in that dimension hitting the 10 in our current dimension does not mean that we are perfect it just means that we now have the opportunity to go to The *NEXT* Dimension. A "2" in The *NEXT* Dimension is actually higher than a "9" in the previous dimension.

This is very important for a business owner to understand. In The *NEXT* Dimension there are a different set of rules and if we do not know and honor these rules we will then not succeed in making the jump to the next dimension and will slip back into the previous dimension.
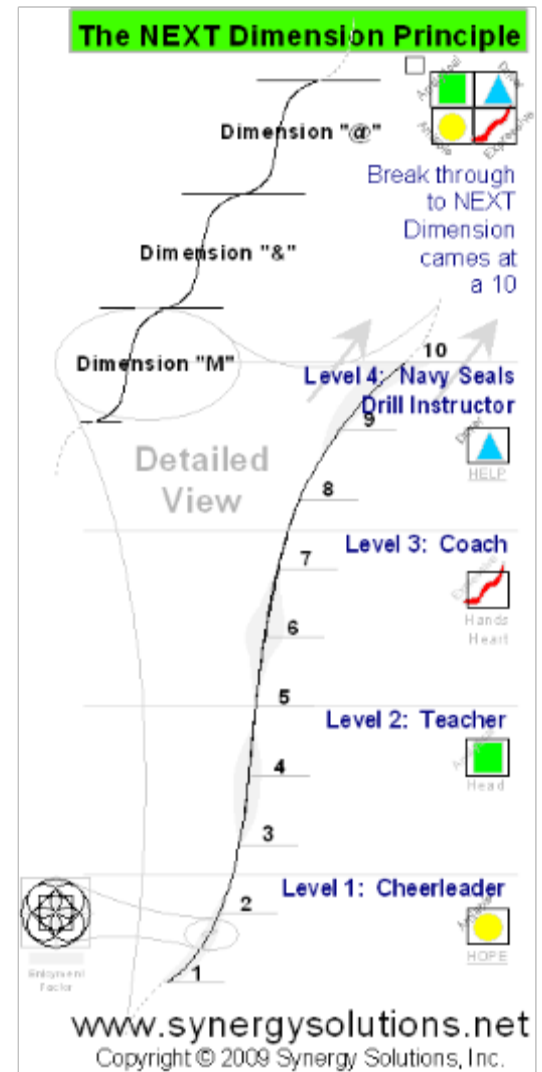
. . . those who do not . . . simply go out of business.

As the marketplace becomes more competitive, as there are more technology advances, as there is more innovation in the marketplace those who jump to new, higher dimensions will be greatly rewarded and those who do not, will either struggle in business, best case scenario, or will be acquired by a stronger business, or will simply go out of business.

The NEXT Dimension Principle

Dimension "@"

Break through to NEXT Dimension cames at a 10

Dimension "&"

Dimension "M"

Detailed View

10

Level 4: Navy Seals Drill Instructor

9

8

7 — Level 3: Coach

6

5

4 — Level 2: Teacher

3

2 — Level 1: Cheerleader

1

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What holds us back

Simple to Complex to Simple Principle

Simple | Complex | Simple | Complex | Simple | Complex | Simple

The SOLUTION

Move to complex sooner! Reduce the time we're into complex, meaning, figure out how to be complex without the complexity. Use the 80/20 Rule to find out the best of the complexity and then master. Have a great plan, prepare, have the right people, and be focused.

It is a choice we have to move up to the next dimension or move down. When we are praticing those things which move us UP, we move up, and when we are praticing those things which move us DOWN, we move down. When things are going up, we tend to gradually pick up those things which bring us down.

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Breaking Free

When we zoom in, on a break through moment, we see that there **IS A GAP** between the dimension we are in and the new dimension. We also see that there IS NOT A GAP from sliding back down or even going into a previous dimension.

This makes sense where it is far easier to try to stay were we are, rather than having faith and moving to make the jump to the next dimension.

Holds Us Back/Moves Us Forward . . .
Jumping the GAP requires FAITH. Could be faith in God/Higher Power, could be faith in self, others, a system, process, or tools.

Moves Us Forward	Holds Us Back
- Faith	- Fear
- SEE	- Do not SEE
- UNDERSETAND	- Lack UNDERSTANDING
- DO	- Do not DO
- Humility	- Pride
- Great Stewardship	- Poor Stewardship
- Contentment	- Lust Of The Eyes
- Self Discipline	- Lust Of The Flesh
- Perspective	- Low Moral
- Strong Life Vision	- Luke Warm

If we maintain all the things we had in moving up, in theory, we would never need to move down. DO NOT lose the best things we have going UP and won't go DOWN!

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When Tom Kunz shares "Trust the integrity of the system!" a big part of the system is the proper understanding and the proper implementation of the natural laws.

If you believe you are implementing the system as you best understand it and still are not getting the results it may be due to people within your team who are not changing the way they approach or think about their position.

The system even addresses how to get people on the team to think in a different way as that thinking may be the difference between you achieving your overall vision and missing the target.
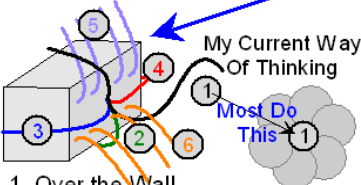
Learn To Think Differently

We as human beings tend to think a certain way. This is based on our personality, how we were raised, how we respond to the world arround us, and the choices we make.

Our thoughts govern our actions and our actions govern the success we see in life. The way we think is what has created the success we have realized and is also what is holding us back from even greater success.

Walls Of Opportunity

My Current Way Of Thinking

Most Do This

1. Over the Wall
   - My Current Way Of Thinking
2. Under the Wall
3. To the Left
4. To the Right
5. Blow it Up
6. Tear it Down

There are at least 6 different ways to think about a situation that are usually very hard to see. When we learn Personality Materies and the discipline of training our brains to see at least six ways to think, we see greater success.
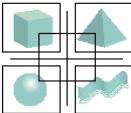
Albert Einstein

"You can never solve a problem on the level on which it was created."

Albert Einstein - 1879 to 1955

As a result of getting stuck in our way of thinking we earn less money, work more hours, have more stress, and have a less balanced life.

5   6

"What are five other ways I could think about this situation?"

We tend to quickly come to a conclusion, have a thought about anything and then we seek as much data/information to support our position. This type of thinking will hold us back from seeing success.

If we do not learn to change the way we think, we will not change our actions/behaviors and if we do not change our behaviors the outcomes we realize will not change as well. Change is HARD, at least in the short term, and NOT CHANGING IS HARDER at least in the long term.

6 Steps To Overcoming Blindness

Pastor James McDonald
Sharing from John chapter 9

1. Clean Your Glasses - Narrow thinking blurs our vision
2. Get Involved - Involvement opens our eyes
3. Close Your Mouth - Our ceaseless talking prevents us from seeing
4. Open your Mind - Analysis paralysis blinds us
5. Stand On Your Story - Seek the truth always and make it stick
6. Humble Your Heart - We often need others to help us to see

Pastor James shared "Those who think they see everything often see nothing and those who see nothing may see everything."

Thinking the same way we have always thought, really is being blind. Adversities in our lives help us to see where we are blind and tend to help us to be more open to seeing things in a new way.

Imagine . . . with every thought we have, if we were to just practice thinking . . . "What are five other ways I could think about this situation?" what would our lives be like?

Exercise . . . What Dimension Am I In?

You can look at your business from a total sales perspective OR you can view it from a profit perspective. Whatever way you view it, the principles are the same . . . *"To roughly double our sales we need to move to a new dimension and to do that we need to learn to think in a different way."*

[   ] - Total Sales   OR   [   ] - Profit

    "X" the dimension you are current in

        "0" the dimension you desire to be in by ___/___/_____

___ Dimension 1: < $25,000

___ Dimension 2: $25,001 to $50,000

___ Dimension 3: $50,001 to $100,000

___ Dimension 4: $100,001 to $250,000

___ Dimension 5: $250,001 to $500,000

___ Dimension 6: $500,001 to $1,000,000

___ Dimension 7: $1,000,001 to $2.500,000

___ Dimension 8: $2,500,001 to $5,000,000

___ Dimension 9: $5,000,001 to $10,000,000

___ Dimension 10: $10,000,001 to $25,000,000

___ Dimension 11: $25,000,001 to $50,000,000

___ Dimension 12: $50,000,001 to $100,000,000

___ Dimension 13: $100,000,001 to $250,000,000

___ Dimension 14: $250,000,001 to $500,000,000

___ Dimension 15: 1 billion to 2.5 billion

___ Dimension 16: 2.5 billion to 5 billion

___ Dimension 17: 5 billion to 10 billion

___ Dimension 18: 10 billion to 25 billion

___ Dimension 19: 25 billion to 50 billion

___ Dimension 20: > 50 billion

1. How long have you been in the dimension you are currently in? _____

Why is it that often, companies get to the top of a dimension (sales or profit), we get stuck there? If we are stuck in the top of a dimension for more than one year then it is probably a good indication that our Life Vision may not be high enough.

a. If we are stuck in a dimension for more than a couple of years, why do we think we are stuck there?

    ___ 1. I am pretty satisfied where I am at - i.e. My **vision** is not driving me.

    ___ 2. I do not know how to **think** to the next dimension.

    ___ 3. I do not have the **knowledge** base I need to have to move to the next dimension.

    ___ 4. I do not have the personal **discipline** to take action on what I know I need to do.

    ___ 5. I do not believe I have the **network** to get to the next dimension.

    ___ 6. Other: _____

Exercise . . . What Dimension Are You In? continued . . .

2. If I were to better organize my database into groups / subgroups and better deliver a message to those individuals in my database, what is my gut feel as to how much more business - sales/profit do I believe that I would generate from the same database/network that I currently have? $_____ / Year

   a. What is the one thing you are better at than anyone else in the world?

   b. How long has it taken you to get to the level of success you see in that area? _____ / years

   c. Have you ever found that there are a fair number of people who desire to get to where you are at in the above area . . . but are not willing to invest the time, dollars, resources, and/or make the necessary sacrifices to gain those skills?

As we get deeper into the 5/30 Grid we may very well start to see that we are not willing to really devote ourselves to the masteries of a something that is needed to get to the next dimension. If we are not willing to devote ourselves to masteries in these areas then we MUST choose to either stay in the dimension we are currently in OR to apply one of the 5 Time Management Freedom Fighters - Link 071 - to get others who are willing or already have that knowledge base.

Box 6: Group People & Message Together is one of those areas. When we first get started we have a simple database and a few people in that database. A new partner shared with us the other day . . .

> **"Mark, it is obvious that you have an amazing process to process large groups of prospects to find the needle in the haystack and you have a lot of ways to earn money - bring solutions - to every straw of hay in the haystack."**

How did this come about? This came about as a result of a Life Vision of reaching every single person in the world and making a huge difference in every area of their life. Yes . . . that is 7+ billion people.

With that large of a vision, you soon realize that you need a lot of funding and if you are going to touch every straw of hay then you better learn very quickly to do it in a very efficient way and you better learn to add value to everyone you touch and gain more back than you put in.

You can either "Trust The Integrity Of The System Or Not" it is up to you. If you have not completed the Life Vision exercise then you either aren't paying attention OR you do not trust the integrity of the system. If you do not trust the integrity of the system i.e. you do not do the assignments then DO NOT BLAME THE SYSTEM for the failure that you will see at some point.

How are you going to eliminate low dollar-productive activities?
- [ ] 1. Delegate
- [ ] 2. Systematize
- [ ] 3. Contract out
- [ ] 4. Hire someone
- [ ] 5. Partner(s)

Time Management Freedom Fighters

The Golden Triangle is the foundation for the entire 5/30 Grid and your entire BOS. If you are penny wise and dollar foolish you are building a house on a weak foundation and it is only a matter of time before you house will collapse.

Another natural law we will learn very well is the "Caught In The Middle Principle." It's not enough for us to grow personally but we need to help others to grow around us.

As we get deeper into the 5/30 Grid we / others will have the temptation to cut corners, try to figure out short cuts, settle for something that is GOOD vs. GREAT, or any one of a number of other poor choices.

Watch the movie "Charlie and the Chocolate Factory" and see if you SEE things that you never saw before.

What was the owner, Willy Wonka, of the chocolate factory looking for? How did Charley respond throughout his entire journey? What was his attitude? How are you like Charley and how are you not?

Caught-in-the-middle principle

Must know principle in leadership, systems, tools, and building winning teams.

Owner Co-workers Vendor

YOU

Your Name:_____

Referral Sources Clients Prospects

If we're surrounded by ineffective, inefficient people we too will be inefficient and effectiveness. We must help everyone we come in contact with on a daily basis to be the most effective professionals in their industries.

Will you start strong on this journey and then drop out? Will you give up or become arrogant and say: "I think I've got all I need out of this, I think I'll move on."

Will you go the extra mile as Charley did? Will you SEE that this recommendation was put in here for a very specific reason and if you miss watching this video then you are not following the system?

If you want to ever get your business to run without you . . . then you will employ a great deal of what Willy Wonka did in his search for a successor. If you want your company to forever be in place, meaning . . . leaving a legacy to continue to keep your Life Vision moving forward, then it is strongly recommended that, at this point in time, that you move to The *NEXT* Dimension in how you go through this and other workbooks in the 5/30 + Personality Masteries series.

If you are an owner of a company, following this system is the secret to getting your business to make a profit without you. If you are an employee then this system is the secret to helping you *"Reach beyond your dreams and goals in every area of your life."*

If you look at this workbook as "just another workbook" then that is what it will be to you.

If you look at this workbook as being the instruction book as to how you will achieve your Life Vision . . . than that is what it will be to you. It is totally up to you and your Life Vision, reaching your full potential is totally within your control. Success is your choice and your choice alone.

INTERESTING NOTE . . . Looking back . . . did you make a $10 contribution for this workbook to Life Masteries Institute?

If you did, great work, as that is part of the system. If you did not, why not? Did you think someone else would? Did you think your employer did this on your behalf? They should have, for sure, but they didn't do it for you they did it because this brings them a great deal of value. Someone else can't put "skin in the game" for you, you need to do it yourself.

http://www.lifemasteries.org/

Box 6 - Group People & Messages Together

Level 3: Group People & Messages - <u>Link 072</u> -

What is one of the biggest mistakes that businesses and sales professionals make? They put all their contacts in one central database and soon, the database can not be marketed because groups are not being set up properly. This 32 minute lesson and 27 minutes of Q&A packs a real punch in helping you understand how to group people/companies together in a way that not only will help you make a lot of money, but also work fewer hours. Working smarter NOT harder is the magic to this lesson.

You might be saying . . . "Wow, we seemed to really get off topic." Actually the system, the knowledge doesn't work, without the magic of the natural laws. If you are racing through this workbook to get it done, as fast as you can, and do not notice / do the magical pieces which are integrated into the DNA throughout the entire workbook, you will come up short.

At this time, we would strongly recommend that everyone in your entire team go through Career Success - <u>Link</u> <u>073</u> - Most will not . . . and at some point our BOS will fail.

COACHING TIP for Employees

Once you discover your own personal Life Vision it is critical to you, for you to achieve your full potential in every area of your life, that you see, very clearly as to how your Life Vision fits into the overall vision of your company.

If you do not see how your Life Vision is totally connected to your Company Vision you will want to talk to someone in your company who is an ActionVision certified consultant, an MSP, or someone who is certified in Career Success.

How is my Life Vision fully connect into the Company's overall Vision?

Do you remember . . .

. . . Did you follow through in getting the MCAT? If you did not, list all the reasons why you did not follow that recommendation.

Is it possible . . . that those who were involved in the development of this workbook have gone out in front of you, ahead of you, and have discovered why the MCAT system is the best long term solution for not only your BOS but also for the achievement of your Life Vision. You can trust others, trust the integrity of the system OR you can trust what you know right now, within your own dimension, and as you move to other higher dimensions, you will start to SEE and UNDERSTAND things that you now do not understand.

NOTES

Box 2: Develop & Deliver A Message

As we grow our business, as we grow our vision, our network, our database we need to continue to fine tune, group, organize people into a wide range of groups. If you have decided to move forward with MCAT then most of that structure will already be set up for you.

If we do this properly, we will have our full marketing structure all set up which will empower us to **organize** all our people, our products/services, our messages - marketing - training - and AP's - automated processes. When we are fully organized all of marketing efforts will be more efficient, which means we will generate more and better leads, in less time, with less money/resources. This will lead to us earning a lot more money, with less effort, in a systematic fashion, which will lead to less stress and greater overall balance in every area of life that we value.

Now that you are further along in the 5/30 Grid review over your database "Chart Of Accounts." As a review, if you have ever set up a "Chart Of Accounts" this is the same type of concept, just for databases and your marketing library. You can set up a chart of accounts on your own without a CPA, but it is NOT recommended. You can create your own database structure but it is NOT recommended. Work with an ActionVision certified consultant and/or an MSP for best results. They will save you so much time!

What is your group structure for your database . . . (List level 1, 2, and 3)

Exercise - Database "Chart Of Account"
Top Level Structure
  Second Level Structure
    Third Level Structure

See example next page . . .

Example . . .

MSP Tip #9 - Worksheet

MSP - Marketing Solutions Providers have a number of different tips, suggestions, tools, templates, and resources. "Why reinvent the wheel?" These may include printed or promotional materials, specialized worksheets, examples of others who have done the work and / or referrals to individuals who can actually do the work for you. DO NOT REINVENT THE WHEEL! If there are tools / resources which are already available, use them!

Great questions to ask your MSP:

Does my database structure support not only my database but promotions, marketing, training, and AP's automated processes? Is there anyone in my industry who has already set up the entire BOS - Business Operating System for their own business to where I could license their BOS for my business? How do I best position myself for the next phase of the 5/30 Grid to reduce the time, money, and effort to achieve my goals.

IMPORTANT NOTE

All the following comes from Personality Masteries. Personality Masteries is so important to the proper implementation of the 5/30 Grid that we have included all the following for your benefit.

For information on a Team Assessment - Link 075 -

For information on how you can become certified - Link 076 -

For information on many different other resources in the Personality Masteries - Link 077 -
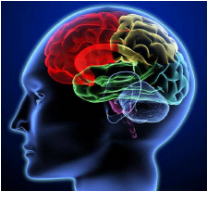
Personality Masteries

"Reaching beyond our dreams and goals in every area of our life."

Welcome to the Personality Masteries team assessment and the team/leadership survey. The assessment and the following report will help your team to better understand one another and better function as a team. Personality Masteries has been developed over the last twenty plus years and is designed to help individuals and teams better understand themselves as well as those they work and connect with on a daily basis.

Overview

Once we know an individual's personality we know their strengths, weaknesses, why they are successful, what is holding them back from additional success, if they are married, what type of individual they are probably married to, strengths and weaknesses in the marriage, why they would like to work with you or if they would not, why not, and what you can do to better connect with them. We have individuals who have their Ph.D. in Psychology who go through the certification process and are amazed at how powerfully accurate the process/system is in understanding themselves as well as others. **Achieve success in all relationships in ways most people only dream of.**

Benefits

Personality Masteries certification will bring value to our **careers** in helping us to clearly understand where we are gifted, why we have the passions and vision we do, and how to achieve more personal and professional success. Because we learn more about ourselves and those around us, Personality Masteries certification will assist us in improving our working relationships with those in the community, our spouse or significant other, our parents, children, siblings, friends, and any other relationship which is important to us.
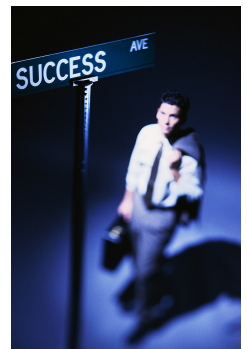
The Secret To Success

Personality Masteries certification will help us to learn how to ask ourselves and other people a few simple questions which will then reveal their personality. The process creates so much curiosity in people that they beg for additional information and wonder how you know so much so quickly about them.

The unique certification process helps you to apply what you learn after just two simple lessons. Imagine having deeper and stronger relationships where there is less stress and conflict and greater harmony individually and with the group as a whole.

"I have never seen anything like this. It is helping me personally and professionally. It is a scientific process for understanding people, which anyone can understand. I use what I have learned EVERY day!"

Dr. Gregory Simpson (Ph.D. in Organic Chemistry)

"This is the fastest, easiest, most powerful program/system for understanding personalities I have ever seen. It is presented in a way that anyone can understand and use every day in every area of their lives."

Dr. Pam Straker (Ph.D. in Psychology)

"Personality Masteries is the DNA for understanding people. As President of CENTURY 21, overseeing over 140,000 agents in over 70 different countries, I probably saw every personality assessment on the market. This is the fastest, easiest, and most comprehensive test anywhere and so very simple for people to pick up and use in every area of their daily lives."

Tom Kunz - past President - CENTURY 21

Personally & Professionally

Have you ever known someone who didn't like you and you didn't know why?   Imagine having knowledge and understanding which empowered you to have **control** over every situation where people are involved. Imagine having **more fun** with more people and creating laughter, excitement, and energy everywhere you went. Imagine **learning** how to have more and better relationships which would enable you to see greater success, in less time, in every area of your life.

"Personality Masteries is so powerful and the Marketing Resources library you have built . . . WOW just amazing! Most people don't think of CPA's as being the most innovative types of people, but the resources you make available are changing the way I do business. Thank you!"

Scott Allred - CPA

Another powerful aspect for team development is a leadership - team - personal assessment which gives us insight into how everyone, throughout our entire team, could perform at a higher level based on our personality and those around us. This assessment can be done for families, work teams, friends, clients, community groups, or any other group of people who are or would like to connect.

Leadership Team . . .

Geo Test

Ned
Alan   Karen

Hal

Joe

Susan

Chris

Pain Test

Susan

Alan   Karen

Hal

Ned

Chris

Joe
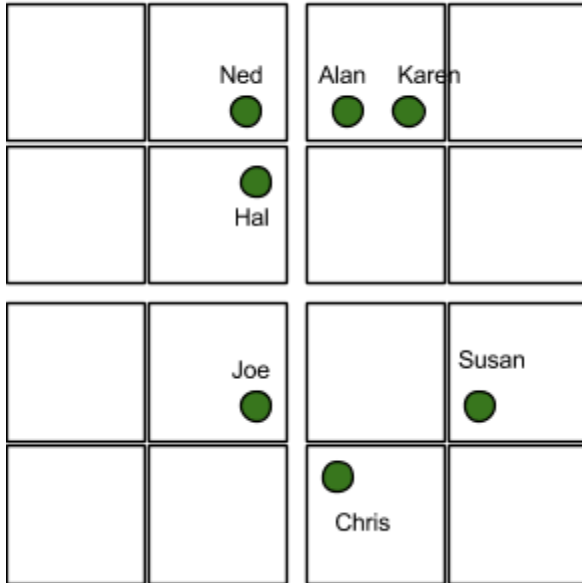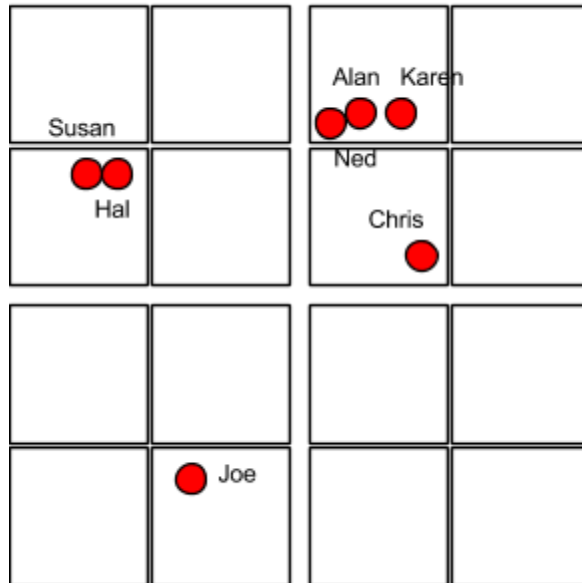
Hal	1324	1342	(2666)
Alan	2143	2143	(4286)
Joe	4231	3421	(7652)
Karen	2134	2134	(4268)
Chris	3412	4132	(7544)
Ned	1234	2143	(3377)
Susan	4213	1342	(5555)

Combined

Hal

Ned
Alan
Karen

Susan

Chris

Joe

○ Little Variance   ○ Larger Variance
○ Very Large Variance
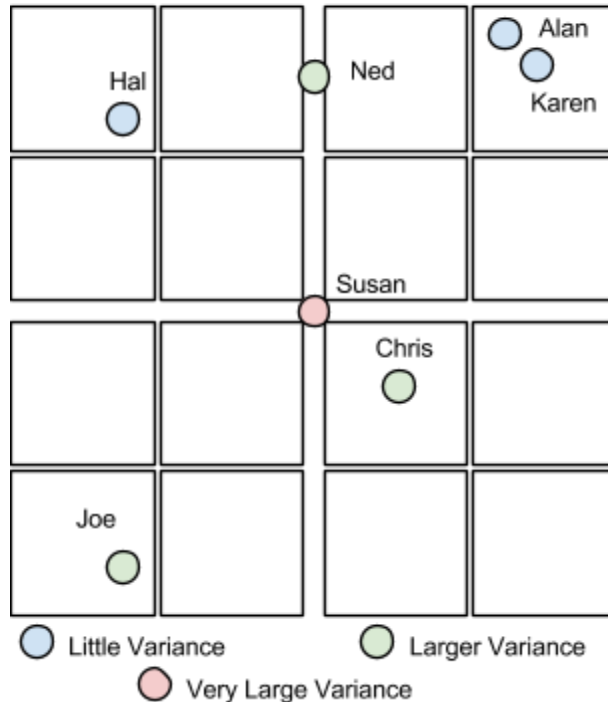
Survey - Big Picture Overview

Additional Questionnaire

Additional questionnaires/surveys can be done on people within a group. As we learn about the personality fingerprint of a group we then are in a perfect position to help each individual learn more about themselves as well as the team as a whole. As we learn to magnify the value/gifts of each team member then the team as well as each team member will see far greater success. *"We can accomplish far more together than we ever could on our own."*

The following is one of the more popular surveys which can be completed within a company/organization with employees. Each team can customize the surveys to meet their specific needs.

From a 1 to 10, with 10 being the best, how would you rate the following:

Leadership - 7.18

6.46 1. Leadership - Understands team members

7.25 2. Leadership - Listens and is open to new ideas

6.37 3. Leadership - Concern for each team member's life dreams and goal

7.55 4. Leadership - Understanding of how to best run a company

8.25 5. Leadership - Heart/Passion for other people

Team - 7.80 (9% HIGHER than Leadeship ratings)

7.82 6. Team - Listen & is open to leadership's input/suggestion

7.99 7. Team - Understands and buys into company vision

7.86 8. Team - Concern for owner's life dreams and goals

7.17 9. Team - Concern for the good of the team over self

8.15 10. Team - Competency within individual's positions

Self - 8.68 (11% HIGHER than Team ratings)

8.56 11. Self - Hope that I will achieve my life dreams/goals with company

8.87 12. Self - Understanding of my responsibilities

8.38 13. Self - My vision, passion, excitement for being on the team

8.91 14. Self - How well I take action and do what I need to do to see success

8.66 15. Self - Honesty with my true thoughts and perspectives

8.89 16. Self - Coachability   (110% higher than Synergy's rating)

4.24   Synergy's rating

5.86 17. Trust Others

8.95 18. Would like to   (Would like to trust people 53% more)

9.46 19. Trust Self   (61% more trust of self than others)

Chamber Of Commerce / Associations

Community Based Organizations

We have found that Personality Masteries is one of the most effective tools/systems in helping community based organizations create the greatest impact for their members and those they serve. It seems, that there are 3 R's to success as it relates to seeing greater success within any **community based organization**.

      If you are a business organization and not working closely with community based organizations you are missing a huge opportunity to bring value to others while growing your company. Personality Masteries and other associated tools and resources were designed to help your local chamber and/or association to better help you as you help them. When we partner with community based organizations we create WIN WIN WIN situations for everyone. *"We can accomplish far more together than we ever could on our own."*

3 R's To Success

Retaining Current Members (R1)

Retaining current members is critical to any community based organization and to do that is both an art and a science. We need to understand their biggest challenges, what they would love help with, what their needs, wants, and desires are . . . and the most effective way we have discovered to do this is through surveying members and discovering the personality map for members.

We often believe we are implementing strategies or programs for the benefit of members, only to discover, that members are not embracing what we are offering. Often the offering (new programs) is something which will help members. but the communication of how that offering will bring benefit to the member, based on their own unique personality, is not communicated to our members based on their personality which prevents them from seeing the value. The **5/30 Grid** + **Personality Masteries** + **Natural Laws** within **Career Success** will help you to not only retain members but create members who are RAVING FANS.

Recruiting New Members (R2)

As a community based organization we need to continue to attract new members and that takes time and resource, often time and resources we do not have. When we leverage the **5/30 Grid** we learn how to generate more and better leads, market to those leads in a more effective manner, use systems to convert those leads in a more effective manner, and turn our service of our current members into a new member recruiting machine.

Restoration Of Old Members (R3)

Restoring past members is often the hardest of the three "R's." There is a science to doing this and with the right tools and systems, in combination with Personality Masteries we will build a system which will do this on a consistent basis, but will function with minimal time and resources from the chamber.

In most situations this type of program does not require any additional funding for the chamber or association as sponsors are easy to find as these types of partnership relationships will always create WIN WIN WIN for everyone. NOTE: Community based organizations can be chambers, associations, churches/religious based organizations, or any other group/organizations which serves the community.

List all the people of influence - those who are connected to a lot of people OR those who are connected to people of influence.

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

As we bring value to the groups of people influenced by influencers we help a lot of people and in turn they will help us.

The Science Behind The System

Within Personality Masteries an individual can be one of 4 major personalities, 16, when you look at primary and secondary, 64 when you look at three, and 256 when you look at all 4 personality types. When you combine the Geo Test (4 shapes) and the Pain Quadrant testing (what would cause you the most frustration) there are 65,536 possible combinations.

Test 1: Geo Test   = Analytic   = Driver   = Expressive   = Amiable

Test 2: Pain Test   **Analytic** = **Out of order**   **Driver** = **Out of control**

                    Amiable = **Conflict with others**   **Expressive** = **Boring or not fun**

4 Major Personality Types
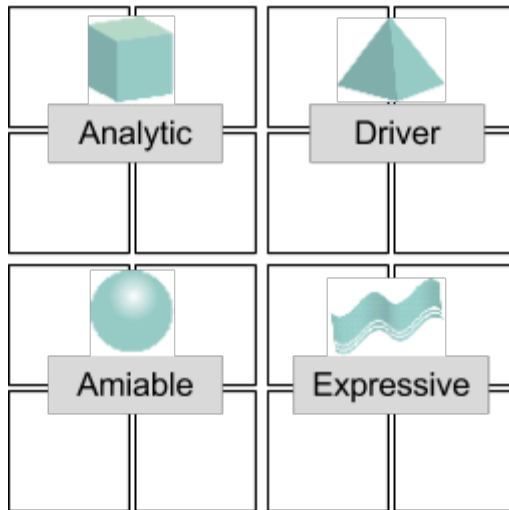
16 Major Personality Types
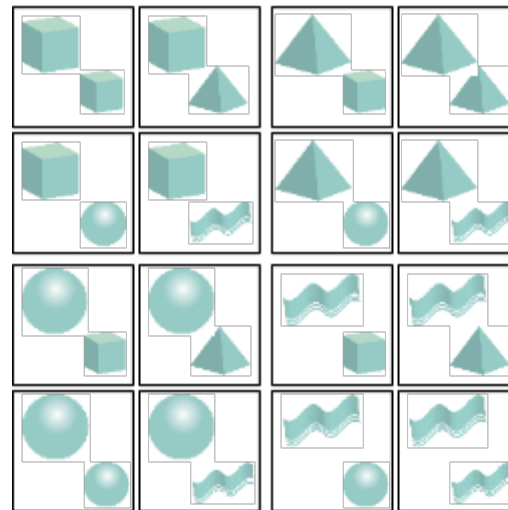
What people/companies love about Personality Masteries is the speed of which someone can learn how to identify someone's personality, the speed (15 seconds) for which it can be done, and the accuracy. If an individual desires to just learn how to identify the four personalities it will change their lives forever.

If an individual enjoys the learning, as most do, they will gradually over time, become experts in Personality Masteries and every day they will learn something new.

"This is the fastest, easiest, most powerful program/system for understanding personalities I have ever seen. It is presented in a way that anyone can understand and use every day in every area of their lives."

Dr. Pam Straker (Ph.D. in Psychology)

64 Personality Types

Keep it simple and just use the four personality types or use both tests and learn how there are small differences which can make a very big difference when you learn how to identify and understand all 65,536 possible combinations.
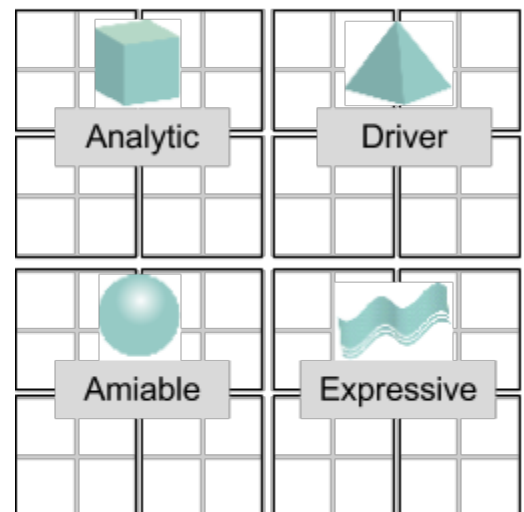
Big Picture

Within Personality Masteries an individual can be one of 4 major personalities, 16, when you look at primary and secondary, 64 when you look at three, and 256 when you look at all 4 personality types. When you combine the Geo Test (4 shapes) and the Pain Quadrant testing (what would cause you the most frustration) there are 65,536 possible combination.

What people love about Personality Masteries is that it takes very little training to have a good understanding of it and you can start to apply it very quickly. Another thing that people enjoy is that the more you know about it, the more you know you don't know. Individuals can learn something new every single day.

If you or someone didn't want to take the test, thought it was a stupid test, or just couldn't make a decision then that person is a unique personality we refer to as a Chameleon personality. Whatever an individual tested out to be, they are not good or bad personalities, the personality of an individual is what it is. Each personality has its own strengths and weaknesses. One personality is not better than another; each one is just different. Understanding our own strengths and weaknesses enables us to assist others and relate to those who see things differently than we do.

Opposites Attract

Opposites tend to attract, which provides an opportunity to grow in areas where we are weak by interacting with those unlike us. Our greatest area of strength will usually also be our greatest area of weakness when we take it to extremes. Usually there is someone in our own family and/or work place, who has talents and skills that are totally different from our own; if we learn to appreciate their strengths and more fully understand our weaknesses, we can work better as a team.

We will also have more opportunities to reach our full potential when we are around people with opposite personalities.

There are some unique personalities who hate to be tested, do not like to "be put in a box," and don't like others to know them in greater depth. This is alright, there is nothing wrong with being this way, again . . . it is what it is. Sometimes people have experienced the misuse of personality testing which can create a distrust of the system or process. Within Personality Masteries, there is an effort to never make a negative judgment, just to understand the truth about each of us.

There are other times where individuals will greatly resist some part of the analysis. With 65,536 possible combinations, it's obvious that this test, as with any test, as with any individual, that nothing is perfect, and we, as individuals probably do not know ourselves perfectly either. It is kind of interesting, when often people who resist the information the most and will deny the data applies to them, will have friends and family members or coworkers often smiling and saying to themselves "It applies a lot more than the individual would like to believe."

When The Test Does Not Seem To Work

If someone resists it greatly, then there may be 1% truth to it or 99% truth. As the saying goes, "When the student is ready, the teacher will appear." Actually, it seems, that the teacher is always around us and we are the ones that just need to be ready to grow and change to achieve our full potential.

When the two tests match, it means something and when they do not it means something else. Again, it's not good or bad, it is what it is. If the two tests match or come close to matching it is easier to read the individual. If they do not match then that individual will tend to be much harder to read and understand. They can shift from one personality to another.

Benefits

Personally

When we better understand ourselves we better understand our life goals, what we are passionate about, why, what motivates us, why we are motivated, and why we do not do things we know we should be doing.

Our greatest strengths are our greatest weaknesses and our greatest weakness is just our greatest strength misapplied. When we learn how to control our own energy or personality strength, we will see greater success in every area of life we value.

Different personalities also will view money in a different way as they also view success in life, career, relationships in different ways too. Learning how we value things in life and how others will have different values helps us to have greater success in every area of life.

As a Team

Being a part of a team obviously has stresses. As a result of better understanding not only our own gifts – strengths and weaknesses, we're able to understand the entire team and each individual on that team in a very different light.

This raised awareness provides a foundation for better teamwork, accomplishing more together, with deeper understanding, friendship, and greater working relationships.

Within Community

As we better understand personalities we better understand the community as a whole as well as specific leaders within the community. This helps us not only have better community relations but also helps us to navigate community relations, compensation, budgets, press, and having positive interactions with other groups in the community.

With spouse or significant other

There are obvious stresses in relationships. While all professionals like to think that we are able to separate our personal from our professional life, the truth is that one does affect the other, either in a positive or negative way.

Since opposites tend to attract in relationships this can cause stress which would be avoided if we better understood our spouse or significant other. What causes pain for one personality type, can actually cause pleasure for another.

Through Personality Masteries we learn to better communicate with our spouse or significant other. As we learn to communicate/connect with them in a better way that will help us professionally and as we grow professionally, we also improve personally. Each will compliment the other.

As a Parent

When we are better able to understand our children, family relationships improve. As family relationships improve, it helps to reduce overall stress in the workplace. Personality Masteries, along with the understanding of many other natural laws discovered through Life Masteries Institute, provide tools and resources to help improve our parenting skills and the relationship we have with each of our children.

With Friends

Friendship with all types of personalities helps us to be more rounded and have more fulfillment in every area of our life. Personality Masteries provides insights that will affect every friendship and human interaction we have.

When Coaching

It seems, that all those who have succeeded in any area of life have had great coaches and/or mentors. When individuals become certified in Personality Masteries they immediately become better coaches/mentors. When we understand at the core/DNA level how we are different than others, we understand that others can be as successful as we are, but will do so in a different way. When we master Personality Masteries we start to see at the deepest levels that we have something to offer everyone we come in contact with . . . and everyone we come in contact with has something to offer us as well.

If we are being coached/mentored or managed by anyone personally or professionally, we should insist that they be certified in Personality Masteries. Why? Everyone of the 65,536 possible combinations of personalities will see success for very specific reasons and will be held back for those very same reasons. Individual(s) coaching us will naturally seek to understand us through their own eyes and understanding of their life experiences.

What created success for them personally, based on their own life experiences, is very different than what is required for us to see success. If the individual coaching/managing us does not deeply understand their own weaknesses, prejudices, tendencies and flaws they will often help us in one area, but will inadvertently hurt us in other areas of our careers/life.

Personality Types

Analytical - Less aggressive, focusing more on the task than on people.

The analytic personality's greatest strengths will tend to be they like to dot their i's and cross their t's. Their greatest weakness will be . . . they tend to dot their i's and cross their t's. Our greatest strength is our greatest weakness and our greatest weakness is just our greatest strength taken too far.

What causes the analytic personality pain is when things are not done properly and in order. This pain is what gives the analytic very powerful energy to succeed in life. This energy is also what holds them back.

Individuals who are analytical may tend to be perfectionists at times and love details. They tend to be good with details, like things to be in order, and think in an outline format. They can struggle with self-esteem issues because of their unrealistic expectations of themselves and others. They can also struggle with pride because they follow directions well and do what they are told, which may result in looking down on others because they do not do things as well as the analytical believes they should be done. Analyticals hate to be wrong, and even if they are, they will have enough information to make it look like they are right. In many situations, these individuals will be firstborns.
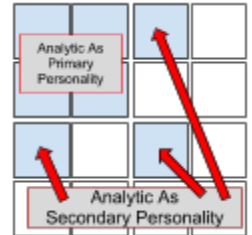
As we drill deeper into the understanding of people and their personalities we start to realize that the secondary personality of an individual has almost as much influence over the individual as their primary. When our primary personality is analytic (upper left) we are driven at the primary level based on our analytic energy. When our secondary personality is analytic - Driver/Analytic, Expressive/Analytic, or Amable/Analytic our analytic energy can kick in at any given time.

This creates a new level of complexity as it's not just the analytic energy that we must understand but the blended energy of the primary personality in addition to the mixture of the secondary as well. When we combine the different energies in a different order, we see a response, a thought process which is very different.

For example, the analytic/driver personality, on the surface may seem very much like the driver/analytic, but they are very different. What makes it complex to deal with people is that two people who seem to be very similar on many things, when given a different situation, requiring different energy, will respond in a totally different way. When this happens in our careers, relationships, or friendships it will not only create confusion, but also frustration and a loss of productivity.

What is exciting about Personality Masteries is that it is so easy to pick up, understand, and gain value from. What keeps people engaged, for a lifetime, is that the more you know about Personality Masteries the more you know you don't know.

Another major reason companies will have all their team members go through Personality Masteries Certification as well as additional training for specific areas within their careers is that this training not only helps employees perform better individually but also in a group as well. Employees also love the learning as they are able to immediately apply this to their personal relationships outside of work.

Employers enjoy when employees are applying Personality Masteries in their personal lives, because the more they learn about themselves and others around them, the more productive the employee/team member will be. It creates a WIN WIN WIN for everyone.

▶Driver - More aggressive, focusing more on the task than on people.

Driver's greatest strengths tend to be their driver, aggressiveness, they make things happen. Their greatest weaknesses tends to be their drive, their aggressiveness, they like to make things happen. Our greatest strengths are our greatest weaknesses and our greatest weakness is just our greatest strength misapplied, taken too far.

What causes the driver personality pain is a loss of control. The driver is actually a very sensitive personality type but often others do not realize this as they are sensitive to things that the other personality types are not. They are very sensitive to a loss of control and see/sense a loss of control before anyone else is able to.

Some people believe drivers are control freaks, when often, it's not that they need to be in control of things but someone does. If things are not in control then they will tend to be very willing to jump in and gain control.
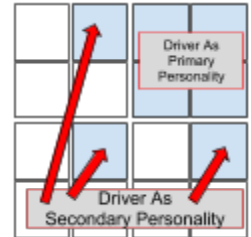
If they believe things are out of control, they will usually do anything they can to gain control, even if it means running over someone as they believe that one person getting hurt is a lot better than a whole group of people being hurt. They tend to be very aggressive and can struggle with being too pushy with people. They do not like their freedom to be restricted, and they are willing to take great risks to achieve their goals. They like to be in leadership positions and often are unconcerned when they hurt people's feelings. They can struggle with people seeing how compassionate they are while other personalities will often look like they are compassionate, but in reality they are not. Drivers hate to lose. In many situations, these individuals will be second children.

Each individual will have a primary personality and then a secondary personality. The primary personality is often a combination of their DNA and their birth order and seems to be pretty much in place at birth or within the first few years of life. The secondary personality tends to be more environmental which would include how our parents raised us as well as our career i.e. those people around us and how their energy gets transferred over and interacts with our energy.

Our primary personality is pretty much rock solid and will not change but our secondary can change. Our blended personality, the energy from all our personality types is what gives us the overall energy we tend to have which largely causes us to learn to think and do what we think and do.

If someone is a Driver/Analytic personality that is a very different personality than a Driver/Expressive personality. The Driver/Analytic will tend to want to do things FAST & PERFECT and in that order. The Driver/Expressive personality will tend to want to do things FAST & FUN. Over time we will learn not only how the primary and secondary personalities interact together but also how the third and fourth personalities come into play as well as how the Geo energy and the Pain energy causes people to show up as very different people at different times.

The more we learn about the 4/16/64/256 or even the 65,536 possible personality types the more we'll have confidence that we really do understand ourselves and those around us.

✎ <u>Expressive</u> - More aggressive, focusing more on people than tasks.

The Expressive's greatest strengths tend to be their energy, excitement, and millions of ideas. Their greatest weaknesses tends to be their energy, excitement, and millions of ideas. Our greatest strengths are our greatest weaknesses and our greatest weakness is just our greatest strengths misapplied, taken too far.

The expressive is often the last born and loves to be the center of attention. They love to have a good time and are good at doing many things at the same time. They have struggles with follow-through and will often sacrifice quality in order to move on to something new. They are aggressive like drivers but are very people-focused, similar to the amiable. They do not like to look bad in front of others and will do anything to get out of doing something that is "boring." Expressives will often struggle with focus and direction as they have so many interests. To them, it is boring to do only a few tasks at once.

If someone has a secondary personality of the Expressive such as the Analytic/Expressive, the Driver/Expressive, or the Amiable/Expressive personality it will cause a person to "show up" in a very different way than if they had some other personality type as a secondary personality.
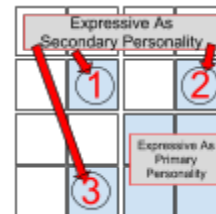
The Analytic/Expressive ① will have a great deal of inner conflict in that the Expressive energy in that type of person will tend to offset the Analytic energy. With both energy's in the same person, it will cause this type of personality to be wildly successful at times and to crash and burn at other times. This person will be greatly confused at times as will be those around this type of person.

The Driver/Expressive ② personality type will have twice the aggressiveness of most personality types where they will be aggressive in getting tasks done as well as social interaction with people. While both "1" and "2" have the same secondary personality type their primary personality type is what causes a very different approach to life, people, relationships, and even how they view success.

The Amiable/Expressive ③ personality type will be very different than "1" and "2" in that they are a double portion of focus on people. This will give them far more "compassion" or patience with people at least as it relates to getting the tasks done. This personality will tend to have challenges getting tasks done themselves as people are always coming to them with all types of issues and since they have the amiable personality type they will not want to "turn people away" and the expressive personality type just likes to talk with people. Will be very connected, people will tend to love this type of personality but will have some real challenges in getting tasks done.

Once we start to see the power of understanding the 4 personality types and how much of a world of understanding that gives us in connecting with people, we can start to look at the two different types of tests, the Geo, and the Pain. At times these two tests will match but most of the time they will not. Sometimes they are close to matching and other times they are totally opposite.

Geo Test		Pain Test		Combined	
2	3	2	1	4	4
1	4	3	4	4	8

When we deeply understand that there is no right or wrong personality type and each one of the 65,536 possible combinations has strengths and weaknesses we can then set out to really discover the gifts each personality type has and how we can better work together.

🔴Amiable - Less aggressive, focusing more on people than tasks.

An amiable's greatest strengths tend to be their concern and compassion for people. Their greatest weaknesses tends to be their concern and compassion for people. Our greatest strengths are our greatest weaknesses and our greatest weakness is just our greatest strength misapplied, taken too far.

Amiables are often middle children and will work hard to keep peace within the family. They hate conflict and will do anything possible to avoid it. They are good at building agreement within a team and bringing people together. They are good at building loyalty and trust within a group of people. Loyalty is extremely important to these individuals. Because they do not like conflict, they will often hold things inside, which can cause bitterness. Amiables will often be the most stubborn of the four personalities if they feel very strongly about something, even though they will often tell you what you want to hear to avoid hurting your feelings.

If we were to look at the three Amiable personality types, we would see some very interesting types of things. The Amiable/Analytic ① personality type would be concerned about people and about getting things done properly and in order. This would cause some measure of inner conflict. This type of personality will also tend to be very stubborn and have a great deal of energy from being an analytic to have a lot of data to back up their stubbornness as well.
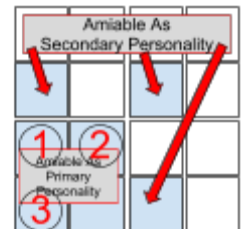
The Amiable/Driver ② personality will want people to be happy but will also want to get things done as well. They, at times, may try to warn someone that they are going to get run over, run them over and then feel bad and apologize for running them over. That attitude/perspective way to see the world in a very different way than, let's say, the Driver/Analytic personality, which will probably not give a lot of warning but will just run someone over as they "should know better" and then explain why that person deserved to be run over.

The Amiable/Amiable ③ personality type is the least aggressive of all 16 personality types and will be very laid back, easy going, and kind of let life be whatever it is. This type of personality will tend to attract a Driver/Driver personality which creates a situation which is, let's say . . . very interesting.

When we learn how the blended energy of our various personalities affect how we SEE - UNDERSTAND - and DO things we start to take control of our energy, our personalities, rather than that energy controlling us. This will help each one of us to better understand how to prevent our strengths from becoming weaknesses and will help us to value, appreciate and understand others around us.

As we understand and value others we then put ourselves into a position to learn from others much faster and in a more precise manner, to where we can input their energy and/or leverage their gifts in a more effective manner, therefore; achieving our own personal goals faster and with less effort as well as the goals of the team and those around us.

❓ Inner-Quadrant or Chameleon

A Chameleon's greatest strength tends to be their flexibility. Their greatest weakness tends to be their flexibility. Our greatest strengths are our greatest weaknesses and our greatest weakness is just our greatest strength misapplied, taken too far.

If you believe you exhibit traits from different categories, you may be an inner-quadrant personality. These individuals may dislike taking the test because they see themselves in multiple personality categories and may have a hard time answering the questions. These individuals tend to be "chameleons" and can adapt to any environment.   They will also tend to have more inner conflict because their primary personality is constantly "fighting" against their secondary personality.

There are four of the deepest inner quadrant personality types which are represented by the dark blue. These individuals either chose opposite shapes and/or opposite things which causes them frustration/pain.
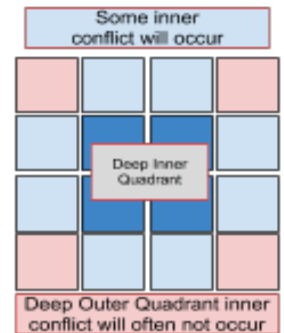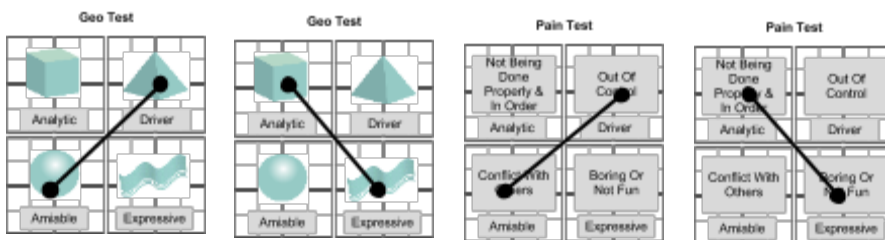
The other way to be an inner quadrant personality type is that you can choose one type of answers for the geo test and very different answers for the pain testing. The light blue are those who have some level of inner conflict.

The pick boxes are those who tend not to have inner conflict as they are in the deep corners of the Personality Masteries grid.

What's interesting about people is that those who have inner conflict often should not and those who don't have inner conflict often should. When we understand at a deep level our inner conflict and as to why it is there we are able to understand all the positive energy that comes along with inner conflict and how that inner conflict will help us to see greater success in every area of our life.

Due to the 65,536 possible combinations the learning in Personality Masteries really goes on for our entire life. If you are looking to see greater success in any area of your life, then the deep understanding of Personality Masteries will help you achieve that goal.

Next Steps . . .

Step 1: Examination

Review the information in the report from the testing which has been completed and talk to your Personality Masteries certified consultant.

There are a number of different types of evaluations which are available in addition to the basic one. Check with your certified consultant for their recommendation.

Step 2: Solutions

People tend to like three types of solutions, a basic, an intermediate, and an advanced solution.

Basic – A phone review of the report with the leadership team along with suggestions on what should be the next steps.

Intermediate – Develop a detailed ActionVision team plan which lays out the vision for the group as well as what specific actions will be taken, by whom, when, and how those actions should best be taken. The ActionVision plan will be scored monthly and leadership/team coaching will be provided.

Advanced – As the Intermediate plan is implemented and there is a desire to expand what has been learned to others, individuals within the team may be certified to provide the consulting and leadership coaching to others in the community, to community business groups and to provide good will.

Step 3: Implementation

Implementation is where most teams fail. Individuals or groups get very excited, are motivated, but often do not follow-through. There are many different methods, resources and tools to assist teams with follow-through and every implementation plan can be customized to meet the teams needs as well as budgets available.

OnLine University – This is the most affordable option and is the most flexible as well, because courses are available 24/7. Courses are available in Personality Masteries certification, leadership, team development, planning, family, and many other topics of interest.

Group Coaching – Get together with other leaders in the community, and/or business world. This can be something offered just for the team or other groups of people. Group coaching sessions can be customized, recorded, and shared with every future team member as a way to affordably build culture for every current and future team member.

One On One Coaching – This provides custom leadership/team coaching for individuals within the team. This is very powerful because it addresses specific needs of individuals.

ActionVision – Link 079 - The ActionVision (AV) system is designed to build a custom plan for an individual and/or a group of individuals. Those who go on AV, on average will see a 35% increase in work productivity within 60 days, over 95% of those who start will follow-through, and there is a positive 4% correlation between efforts invested and results accomplished.

AV utilizes one on one coaching, group coaching, and the online university to provide a unique, blended experience to help individuals see the most, understand it quickly, and then take action to change in the least amount of time.

The follow up consulting/coaching plan should be built and implemented based on the data from the surveys completed. There are over 120 Natural Laws Life Masteries Institute and our network have discovered to leadership, human development, performance, and helping people.

When these laws are applied in the right way, in the right order, at the right time, by the right people we will see amazing results. A certified consultant has hundreds of hours of training, millions of dollars in technology to support them and assist you and your team see greater success in less time, with less effort.

The following pages will assist in developing the best resources needed to assist you achieve your stated goals. Each one of the following solutions have incorporated the 5/30 Grid - Link 080 - which is the DNA for business AS WELL AS Personality Masteries which is the DNA for understanding and motivating people - Link 081 - to achieve their full potential.
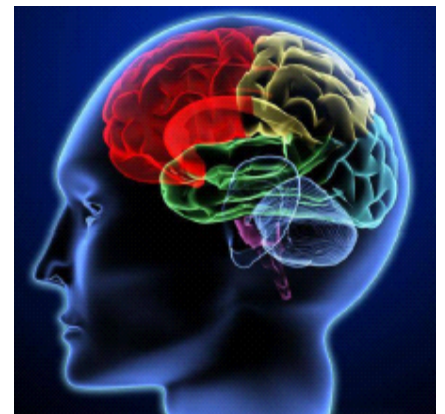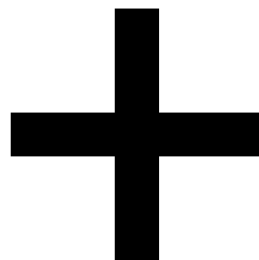
As we incorporate Personality Masteries throughout every part of our DNA within our company we will see greater success, with less effort, in less time as a result of every team member better understanding themselves as well as those around them.

- For Businesses - Link 082 -
- For Community Based Organizations - click here - Link 083 -

NOTE: Click on the boxes in the above links for specialized lessons.

The 5/30 Solution Grid

	Level 1	2	3	4	5	6
Area 1: Marketing More & Better Leads	Identify Targets 1	Develop & Deliver A Message 2	Group People & Messages 6	Measure Results 10	Personality Based Marketing 15	Dollar results marketing 20
Area 2: Pre-Sales Move leads to conversion	Track 100% of leads 3	Implement 10+ Strategic Strike 5	Improve pressure points 9	Personality Driven 14	Large New Lead Sources 19	Model for profitability 24
Area 3: The Sale The "Yes" or the "No"	Ask key questions 4	Master "Present Solutions" 8	Why prospects are lost 13	Apply 5 Freedom Fighters 18	Speed To Sell 23	Penetration Expansion 27
Area 4: Servicing Turn our servicing into a profit center	Ask for referrals 7	Feed Successes into 1,2,& 3 12	Master steps pressure points 17	Measure all costs 22	Apply 5 Freedom Fighters 26	Turn into profit center 29
Area 5: Client For Life Create profitable life-long relationships	Send monthly relationship newsletter 11	Obtain B2B and B2C referrals 16	Track all efforts & results 21	Implement R & D 25	Process For New Products 28	Apply 5 Freedom Fig...

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The following solutions are powerful and are often done in the order listed below.

Business Operating System - Link 084 -

What does every company who is wildly successful have in common? They have a business operating system which assists them duplicate themselves and scale their success upward. Our very own customized BOS will help us build a unique operating system which will empower us to gain more and better of the right leads, convert those leads faster, close those leads with less resources, service those leads in such a way that we build a referral development machine. Once sold, our BOS will then go on to create such an amazing servicing experience that our current and past clients will come back to us over and over again and refer others in their network to work with us.

Personality Masteries - Level 1 Certification - Link 085 -

What does every successful BOS start with? Seeing success on the people side. When we learn how to understand ourselves and those around us better, we see greater success. By learning how to identify someone's personality in 15 seconds and how to relate, connect, and think like that person we will see greater success in every area of of our life. Personality Masteries is the DNA within BOS to success with people.
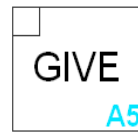
Marketing Solutions Provider (MSP) - Link 086 -

This highly sought after designation provide businesses/organizations the confidence that they consultant/coaching/advisor contracting with has been trained in the art and science of implementing proper systems. Business owners who have contracted with a MSP have said that they are far higher trained in the science of making a profit than MBA's. Personality Masteries is the first certification they go through, 5/30 Grid is second, and then there are hundreds of other courses - training - and mentoring tools, systems, and processes which make the MSP who they are and gives them the ability to do what they do. The MSP is there to help businesses select the right way to build their businesses and to take whatever is invested into the business and produce a dollar return and time savings.

Business X-Ray/Other Assessments and ActionVision - Link 087 -

How important is having a map to arriving at our destination? Do we currently know how to determine the great actions we need to take and then measure our efforts as well as correlating our results to those efforts? If we do the right actions, in the right way, over the right period of time we will produce the results we desire. The ActionVision system is the tool we use to achieve the success in every area of business.

Leadership
Excellence In
Leadership & Success

| Culture & Values A1 | Vision A2 | Belief & Knowledge A3 | DO A4 | GIVE A5 | Our Legacy A6 |
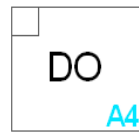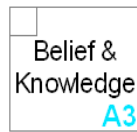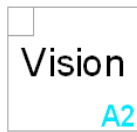
Are we strong leaders? If we say "Yes" how do we really know? Do we realize that our company/organization will only be as strong as the Vision we set and the culture/values we precisely develop? Does our BOS help to instill the self belief in people to create confident team members who explore opportunities which will set us apart from the competition? Are we a company where we know how to take the dreams of each team member and follow through with the right plan, the right actions, done in the right way, over the right period of time? Do we have a culture which gives far more than we take and will leave a powerful legacy to future generations?

Do you have profitable partnerships? What would happen to your business if you had a system of creating partnerships which would create WIN WIN WIN with every one of your clients and those throughout your network? Profitable Partnerships is a 14 week series which trains your leadership team and key team members on how to be great leader while partnering with others.

Profitable Partnerships
Creating WIN WIN WIN

| Level 1 | 2 | 3 | 4 | 5 | 6 |
| HOPE Time B1 | Head Talents B2 | Heart Treasure B3 | Hands Trust B4 | HELP Truth B5 | The NEXT Dimension B6 |
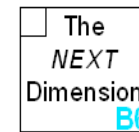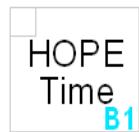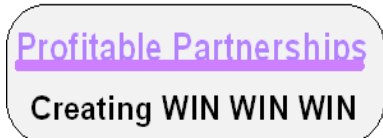
We can think of the 5/30 Grid as a pipeline with five pipes. We as a company are only as strong as our weakest pipe. For our BOS to be successful we need a system, a process which has tools which assist us in determining the best actions to take, how to measure if we are taking those actions, and if those actions we are taking are producing the desired results needed to achieve our overall stated goals.

Specialized training which combine the training of the specific area of our business along with the science of Personality Masteries assists us to build the soul of success throughout the entire DNA of each of the five areas and thirty boxes within the 5/30 Grid. When we integrate the DNA for business, the 5/30 Grid, with the DNA for people, Personality Masteries, what do you believe you'll receive? A blended system so powerful that the vision of your company will be achieved as a result of tapping into the full potential of every single team member.
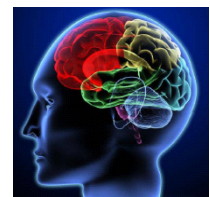
Area 1: Marketing More & Better Leads	Identify Targets **1**	Develop & Deliver A Message **2**	Group People & Messages **6**	Measure Results **10**	Personality Based Marketing **15**	Dollar results marketing **20**

If you had twice as many leads coming into your business would you double your sales/profits? Most companies say "Yes" when in fact this is often not the case. Why not? We often do not see success when it looks like we should, as a result of not understanding the deep laws of success.

One of these laws is the 4 Q's to success - (Q1) Quantity of Leads, (Q2) Quality of Leads, (Q3) Quantity of Efforts to convert the leads, and (Q4) Quality of Efforts to convert a lead. When Q1, goes up, normally Q2, Q3, and Q4 will go down. This is often the way when we increase the leads coming in, we actually will do less sales. If we do not build success based on natural laws much of the time, money, and energy we invest will not be leveraged.

Normal Cycle

With Proper Coaching

When we learn and apply the six levels in Area 1: Marketing with the full integration of Personality Masteries into each lesson/level we will not only generate more leads but also better leads. When we generate more and better leads in full cooperation/integration with the other four pipelines, we have full confidence that our overall profits will increase significantly.
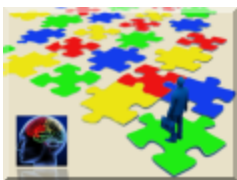
Are you looking for innovative ways to market, to reach out and show how different you are from your competition? Are you looking for a way to set yourself apart and show the marketplace how much value you can bring into the lives of your clients? Are you looking for ways to reach directly into the very core of someone's personality and speak to them in a way they have never be spoken to in the past?

Check out Personality Masteries - Marketing Resources - Link 090 -

Area 2: Pre-Sales
Move leads to
conversion

| Track 100% of leads **3** | Implement 10+ Strategic Strike **5** | Improve pressure points **9** | Personality Driven **14** | Large New Lead Sources **19** | Model for profitability **24** |

Once we have generated the lead in Area 1: Marketing, then Area 2: Pre-Sales takes over . . . or it should happen that way. Many companies combine Area 2: Pre-Sales with Area 3: The Sale, not realizing the massive lost opportunities which happen as a result of doing it this way.

Once the lead drops down from the marketing funnel into Pre-Sales, Pre-Sales will make the decision if they should pass it on to sales or if that lead needs additional nurturing prior to sending it to sales.

Why is this so critical?

Most sales professionals are really designed to be sales closing machines and if they obtain a lead which is not ready to close they will still often seek to close that lead. That is not only not good for the prospect but also not good for the company if they succeed in closing the sale.
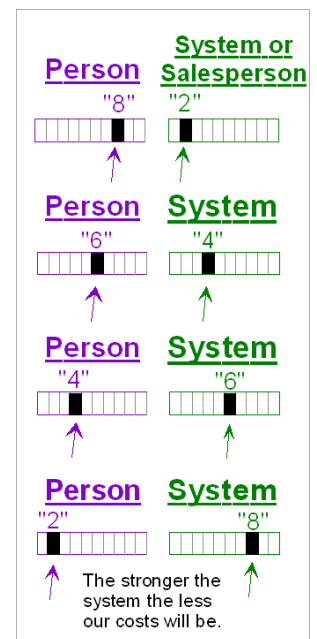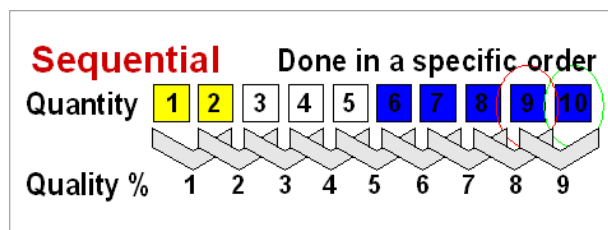
Area 1: Marketing
More & Better Leads

Identify Targets **1** → Develop & Deliver A Message **2** → Group People & Messages **6**

Area 2: Pre-Sales
Move leads to conversion

Track 100% of leads **3** → Implement 10+ Strategic Strike **5**

OR

Area 3: The Sale
The "Yes" or the "No"

Ask key questions **4**

While every personality type can be successful in pre-sales or sales those who tend to do the best in pre-sales are the analytic or the amiable personality type. Those who tend to be natural closers, who do well in Area 3:The Sale, will tend to be more the driver or the expressive personality type. When we leverage the natural personality gifts of individuals to their positions we not only gain additional productivity but also people are a lot happier.

Do we have a system by which we rate every lead which we earn access to? Normally if the lead is a "7" or higher, on a scale of 1 to 10, with 10 being the highest/best lead, then Pre-Sales would pass those leads along to Area 3: The Sale and pass them along all set up to close. If the lead is below a "7" then normally Area 2: Pre-Sales should continue to work those leads through Box 5, a Strategic Strike.

Based on different university studies the average number of contacts which must be made to close a sale is between 6 and 10 contacts. Those same university studies show that the average sales person will only make 1 to 2 contacts before giving up. We need to build a system, based on our deep understanding of personalities, to nurture the weak leads to stronger leads and dish those leads from pre-sales into sales. The stronger our system is, the lower the quality of lead we will be able to convert.

Sequential   Done in a specific order

Quantity: 1 2 3 4 5 6 7 8 9 10

Quality %: 1 2 3 4 5 6 7 8 9

Person "8"	System or Salesperson "2"
Person "6"	System "4"
Person "4"	System "6"
Person "2"	System "8"

The stronger the system the less our costs will be.

Area 3: The Sale
The "Yes"
or the "No"

| Ask key questions 4 | Master "Present Solutions" 8 | Why prospects are lost 13 | Apply 5 Freedom Fighters 18 | Speed To Sell 23 | Penetration Expansion 27 |

Have you wondered what the secret is to reproducing your best salespeople?

Do you find that it interesting that we often have systems throughout the entire company but when it comes to sales we often scratch our heads and wonder what systems we need to implement to capture the magic that every amazing sales person has?

Actually much of the secret is buried deep in one box within the 5/30 Grid that isn't even in The Sales area. It's Box 5 - Implement 10+ Strategic Strike. As we learned in the previous section the weakness, the flaws within most sales professionals is that they often do not have the deep disciplines and/or systems in place which help them to nurture weaker leads.

Implement 10+ Strategic Strike 5

- Link 093 - for more details. This seven week course, titled Prospect Conversion System or PCS could double your sales, without any additional leads, any additional money being invested, without any additional people, it's learning to better work all those leads we currently have. This course would be a great course actually for every single person in the company to go through. Why? This simple seven lesson/week course helps everyone to understand that it it all about the client and that each person on the team has a special piece they can contribute to the conversion of leads. Think about

it . . . how many leads, out of ten, are you converting. What if every single person on your team were focused on converting just one more lead out of ten? What would that do to your sales?
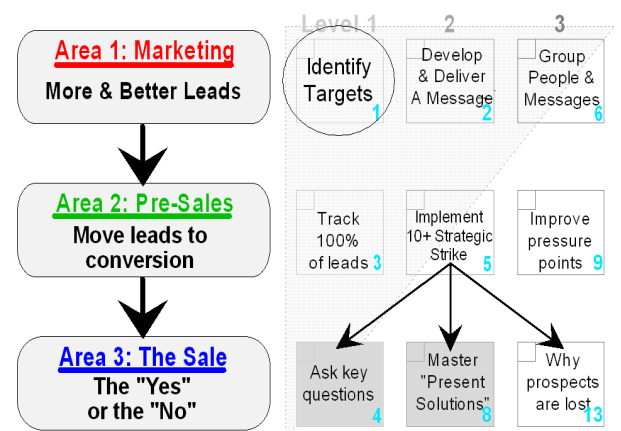
A couple of other weaknesses that many sales professionals fall into is that they often forget it's all about the client and not about their amazing ability to sell. Many sales professionals start out well in that they ask great questions, Box 4, and then present the solution. Over time though, sales professionals often forget the importance of asking the best questions and go far too quickly to Box 8, Present Solutions. The sale is NOT made in the presentation of the solution, but in the asking of the questions.

Once we've gone through the Personality Masteries certification course we understand that there are 16 different personality types when we consider a person's primary and secondary personality type. 1/16th is 6.3% which means the average person off the street could sell to 6.3% of the people they talk with. When we consider that the average sales professional only converts 10% that's not a lot more than 6.3%.

People are people and we all tend to sell to others the way we want to be sold to. We tend to think that others will think and respond the way we think and respond which is only true 6.3% of the time. When we integrate the 5/30 Grid and specifically Area 3: The Sale with Personality Masteries and then integrate natural laws into powerful system, we will convert more of the leads we have invested so much time and money creating.

Area 4: Servicing Turn our servicing into a profit center	Ask for referrals 7	Feed Successes into 1,2,& 3 12	Master steps pressure points 17	Measure all costs 22	Apply 5 Freedom Fighters 26	Turn into profit center 29

Is your servicing group the most profitable area within your whole company?

Probably not! Why not? It's because we do not view servicing as a profit center but a cost center. Interesting, isn't it, that the part where we deliver what we say we are going to deliver to the customer is the part that we often try to cut costs to save money . . . not realizing that when we cut costs we actually are cutting dramatically into profit and don't even know it.

When we use Personality Masteries to build a servicing system which treats our clients the way they want to be treated, not the way we in servicing and/or leadership believe people should be treated, we not only will reduce our costs but will improve the servicing we provide to our clients.

How will our clients show their appreciation for how we service them? They will give us more referrals. It's actually pretty simple when you think about it.
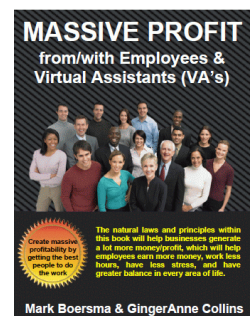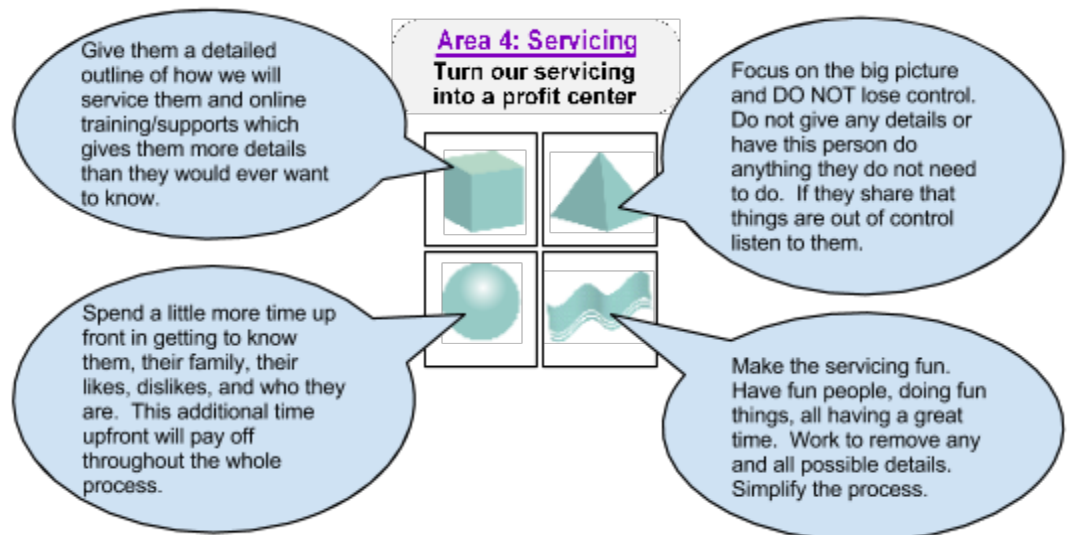
Does everyone in servicing really understand their value? Do they treat their position as if they were the President of their own servicing company?

Does marketing, pre-sales and sales actively seek input from servicing for ways to improve their own areas?

Area 4: Servicing
Turn our servicing into a profit center

Give them a detailed outline of how we will service them and online training/supports which gives them more details than they would ever want to know.

Focus on the big picture and DO NOT lose control. Do not give any details or have this person do anything they do not need to do. If they share that things are out of control listen to them.

Spend a little more time up front in getting to know them, their family, their likes, dislikes, and who they are. This additional time upfront will pay off throughout the whole process.

Make the servicing fun. Have fun people, doing fun things, all having a great time. Work to remove any and all possible details. Simplify the process.

Do you as a leader ever feel that you have silos within your company where there isn't the collaboration between people and departments that should be? Do you know why you feel that way? It's probably because it's true. Seeing the issue is one thing, finding a solution is another.

If every person in your organization were to go through this seven week series it would change the entire culture of the company and how every team member views servicing. Everyone would start to realize how servicing could be the most profitable area within the company and would work together with servicing to leverage all the power and influence they possess.

Do you ever feel like you need more resources but do not have the budget to hire more people?   Is your marketplace requiring more output from your employees but your employees are saying "We can't give any more?" Have you heard about VA's - Virtual Assistants but aren't sure how to go about discovering how to use them to compliment your current staff? - Link 095 - for more details on VA's - Link 096 - for more information on the book.

MASSIVE PROFIT
from/with Employees &
Virtual Assistants (VA's)

Mark Boersma & GingerAnne Collins

| Area 5: Client For Life — Create profitable life-long relationships	Send monthly relationship newsletter 11	Obtain B2B and B2C referrals 16	Track all efforts & results 21	Implement R & D 25	Process For New Products 28	Apply 5 Freedom Fighters 30

Client For Life is the one area that most companies struggle with and often don't know it. If we are weak in Area 1: Marketing, it's obvious as we won't get enough leads. If Area 2: Pre-Sales, or Area 3: The Sale are weak, we won't close the leads that we do get. If Area 4: Servicing is weak, clients will let us know this, but in Area 5, Client For Life, we'll never get a bill, or really even know what the weakness in this area is costing us.

Client For Life is going the extra mile, it's giving the client something they did not expect, they did not pay for. When we understand the Cluster Principle we understand that when we give more than expected we will get far more than we give.

Think about it . . . what would happen if you could tap into the spheres/the networks of everyone of your current/past clients? With social media people are more connected than ever before and have a greater ability to share with those around them how happy or unhappy they are with our services. Are we leveraging social media, technology, and media to get our success stories out through all the networks of those we have serviced?

The Cluster Principle

It's not unusual that an individual will know between 3 and 9 other individuals who are interested in the same product/service over the next six to twelve months.

The number of leads from one lead can be in the hundreds over the life of one's business.
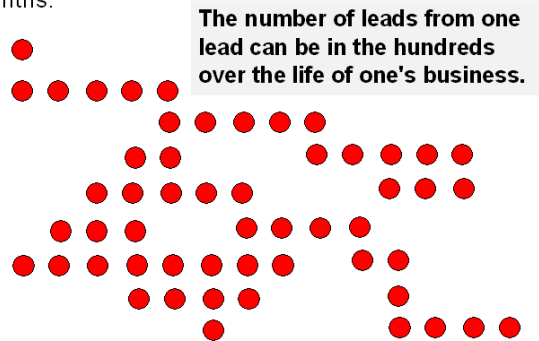
- Link 098 - Do we have a process, a system, with specific people who are responsible for building ongoing relationships with our clients and their networks?

Are we capturing all possible testimonies from our clients, through the many media sources, and then leveraging social media and our entire database to get the message of our success out to the world?

Are we partnering with community based organizations to bring them value and leverage their network and brand/goodwill to open doors that we would never be able to open on our own?

Once we have mastered Personality Masteries and fully integrated the 5/30 Grid within our business we are able to take the 5/30 Grid and not only apply it to growing our business through sales, but also hiring, partnerships with other companies, and community partnerships as well.   - Link 099 - for additional information/resources

Do you believe at the deepest core of who you are that "We can accomplish far more together than we ever could on our own?" Learning what is contained in this information is the easy part. Taking action is the hard part which is why we need the following things:

    * Need a Pro . . . like Tom shared at the beginning

    * We need a plan

    * We need accountability

    * We need a mastermind group
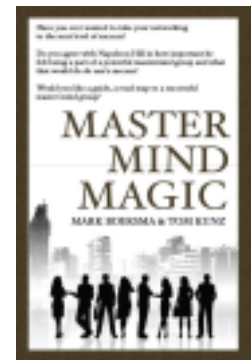
[Link 100](#)

If you have any questions on anything shared in this document please do connect with the person who shared this information with you or please call toll free 888.230.2300.

"When I saw the 5/30 Grid the first time, I was amazed at how easy it was to understand and how it covered everything any business would need, anywhere in the world, at any level. The 5/30 Grid is the **DNA for Business** and will help any business become more successful as a result of having a powerful/profitable Business Operating System."

Tom Kunz - past President of CENTURY 21 Real Estate LLC.

"Being the owner of my own company and working with all types of businesses, I am always seeking tools, systems, and processes which will help businesses see greater success, **earn more money, work less hours, have less stress, and have greater life balance.** The 5/30 Grid does all that and a lot more! Every business on the planet can benefit from the 5/30 Grid."

David Thompson - Proforma

"As President of a company which builds million dollar conservatories all around the world, we have a very unique business. What I found interesting is that the 5/30 Grid has become not only the **instruction manual** for building my business but I share it with every other business owner I know. I understand that as I help others see greater success that I will also see greater success as well. Together we can accomplish so much more than we ever could on our own."

Alan Stein - Tanglewood Conservatories

"As a CPA I am a big systems guy. I have seen over the years how most business owners really end up owning a job not a company. The 5/30 Grid is a fun, exciting, and powerful way to build systems which will **clone you as a business owner.** Every business owner should be using the 5/30 Grid. Every mastermind group should use the 5/30 Grid as the foundation for working together. **Every employee will see greater success** as a result of understanding how their jobs/careers/ expertise fits into the 5/30 Grid."

Scott Allred - CPA - e-Accounting Solutions, Inc.

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