



# #Bullish

VIRTUAL GENERAL COUNSEL PROGRAM

Monthly Progress Tracker

Knowing where you are going is half the battle.

**GO! FIGHT! WIN!**

# How To Print



These instructions assume you prefer a 2-page layout and that you plan to use a 3-hole punch for a binder like below.



## For Duplex Printers

Print this as a 2-sided document. You will need a printer that has the ability to duplex print, meaning that it can automatically print on each side in sequential order. This means page one [the cover] will be on the front and page 2 [this page you're reading right now] will be on the back.

## For Single-Side Only Printers

Print only odd-numbered pages: 1, 3, 5, 7, etc.



Refeed these originals into your printer blank page cartridge holder with the pages usually facing down and upside down but check your printer to be sure as it varies. And then print the even-numbered pages: 2, 4, 6, 8.

This may take some trial and error and if all else fails, simply print the entire thing and manually face the pages in the right direction and use the blank pages on the back sides for notes.

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THE  
**DEAN**  
LAW FIRM PLLC

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[TheWallStreetLawyer.Com](http://TheWallStreetLawyer.Com)

### A NOTE FROM US

Welcome to The Dean Law Firm's Virtual General Counsel Program. Our program is for entrepreneurs and business owners who aren't just satisfied with surviving in their business - but those who are ready to thrive! Our program will counsel and coach you on how to build a business that can be sold for millions of dollars, while providing you with monthly tools and strategies that can be implemented now for an immediate boost in sales and profits.

We will use this workbook monthly to help make your business goals come true. Setting monthly SMART goals is important to keeping your business and your bank account in the black.

**"Building Big Business One Client at a Time"**

# Monthly Goal Completion Status


January 


February 


March 


April 


May 


June 


# Monthly Goal Completion Status

July 


August 


September 


October 


November 


December 


# Monthly Goals

January

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February

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June

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# Monthly Goals

July

August

September

October

November

December



# Productivity Equation (Before the Month Begins)

	Rate: 1 as Didn't Even Come Close						10 as Exceeded Goals			
Sales	1	2	3	4	5	6	7	8	9	10
List-Building	1	2	3	4	5	6	7	8	9	10
Social Media Engagement	1	2	3	4	5	6	7	8	9	10
Continuing Education	1	2	3	4	5	6	7	8	9	10
Productivity	1	2	3	4	5	6	7	8	9	10

Score Directions: Add them up and divide by 10.

Score:      / 10

Average is a 6-8

Those in the 8-10 range typically are more focused, decisive and practice minimalism. Do you follow the Ivy Lee Method everyday? Do you make decisions quickly and avoid analysis paralysis? Do you say no to anything not related to your monthly goals?

## HOW TO IMPROVE YOUR BUSINESS PRODUCTIVITY EQUATION

<p><b>Sales:</b> What went well this month? What can you do to make next month ever better?</p>	<p><b>List-Building:</b> Joiners # _____ Leavers # _____ Where do the majority of your leads come from? What can you do to improve that number next month?</p>
<p><b>Social Media Engagement Interaction levels:</b> What went well this month? What can you do to make next month ever better?</p>	<p><b>Continuing Education:</b> What did you learn this month? What are you planning to learn next month?</p>

### Productivity

Be wise in your associations and selective with your time. You're an entrepreneur on a mission and you don't have time to waste! What are 3 things you wished you had said no to this month? What are 3 things you wished you had said yes to?

### Daily Productivity Tip

Combine the Ivy Lee Method + the Pomodoro Technique. Make sure to set aside 6 goals each night for the next day, and then attack them one at a time until complete. Go through your single-tasking preparation checklist and set the timer for 25 minutes of continuous, uninterrupted and focused concentration on the task at hand.





# Productivity Equation (After the Month Ends)

	Rate: 1 as Didn't Even Come Close					10 as Exceeded Goals				
Sales	1	2	3	4	5	6	7	8	9	10
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# Family

/fa-mi-lee/

## Happiness Equation (Before the Month Begins)

	Rate: 1 as Didn't Even Come Close					10 as Exceeded Goals				
Family Life	1	2	3	4	5	6	7	8	9	10
Career	1	2	3	4	5	6	7	8	9	10
Friendships	1	2	3	4	5	6	7	8	9	10
Health	1	2	3	4	5	6	7	8	9	10
Day to day	1	2	3	4	5	6	7	8	9	10

Score Directions: Add them up and divide by 10.

Score: \_\_ /10

Average is a 6-8

Those in the 8-10 range typically wake up happy. Do you wake up happy and excited to start the day?

### HOW TO IMPROVE YOUR HAPPINESS EQUATION

Find a partner in joy - this could be your significant other, a best friend, a sibling... basically anyone who is up for new adventures like trying out a Bikram Yoga class, trying out a new restaurant or checking out a new store.

Who was your partner in joy this month?: \_\_\_\_\_

Who will be your partner in joy next month?: \_\_\_\_\_

Make your Happiness Equation plans for next month. The more specific (an exact time, place or person) you can be, the more likely you are to increase your happiness.

I think that doing \_\_\_\_\_ might be fun.

I think that spending time with \_\_\_\_\_ might be really wonderful.

I have always wanted to try/do: \_\_\_\_\_

# Family

/fa-mi-lee/

## Happiness Equation (After the Month Ends)

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I have always wanted to try/do: \_\_\_\_\_

# Launch Checklist

For your new product, course, book or app.

Product Name \_\_\_\_\_

Revenue Goal \_\_\_\_\_

Potential Sales Leads (besides your list and social media outlets)  
\_\_\_\_\_

Affiliate Campaign Goal \_\_\_\_\_

Affiliate Launch Dates \_\_\_\_\_

## Affiliate Email Sequence + Dates

4 weeks before Affiliate Materials Launch \_\_\_\_\_

3 weeks before Affiliate Materials Launch \_\_\_\_\_

2 weeks before Affiliate Materials Launch \_\_\_\_\_

1 weeks before Affiliate Materials Launch \_\_\_\_\_

Pre-Sales Dates \_\_\_\_\_

## Pre-Sales Email Sequence + Dates

4 weeks before Pre-Sales Launch \_\_\_\_\_

3 weeks before Pre-Sales Launch \_\_\_\_\_

2 weeks before Pre-Sales Launch \_\_\_\_\_

1 weeks before Pre-Sales Launch \_\_\_\_\_

Official Launch Dates \_\_\_\_\_

## Official Email Sequence + Dates

4 weeks before Official Launch \_\_\_\_\_

3 weeks before Official Launch \_\_\_\_\_

2 weeks before Official Launch \_\_\_\_\_

1 weeks before Official Launch \_\_\_\_\_

Affiliate Revenue \_\_\_\_\_

Pre-Sales Revenue \_\_\_\_\_

Official Launch Revenue \_\_\_\_\_

Total Product Launch Revenue \_\_\_\_\_

## What went well?

## What could be done better next time?

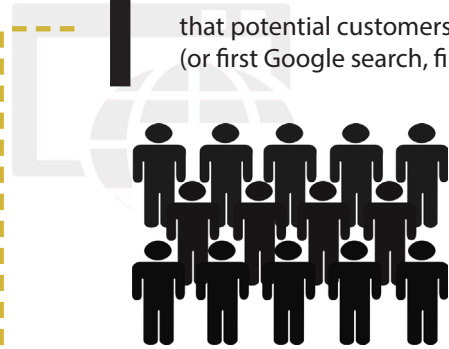
## Important feedback received?

# 5 STEP

## Sales Funnel

### 1 CREATE A LANDING PAGE

that potential customers encounter upon a first visit to your website. (or first Google search, first Facebook interaction, etc.).



A landing page's objective is to get someone on the list, and establish the ever-important first line of communication.

### 2 PRESENT PEOPLE WITH AN OFFER

meaning you should give them something they can actually buy.

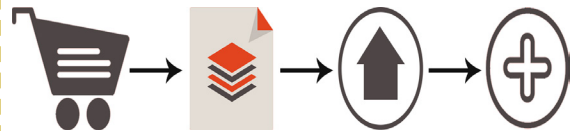


This typically takes the form of a sales page, which indicates a company's promise and shows people what they will get in exchange for their money.

### 3

### PROVIDE CUSTOMERS WITH AN UPSELL OPPORTUNITY

such as the creation of another offer that will deliver even more benefit.



The intent is to establish more speed or automation within an already running process, which will hopefully convince customers they should take things to the next level.

Often, an upsell involves a larger, more expensive, and more advantageous item or service. This can be viewed as the "steak dinner" to the initial offer's "appetizer".

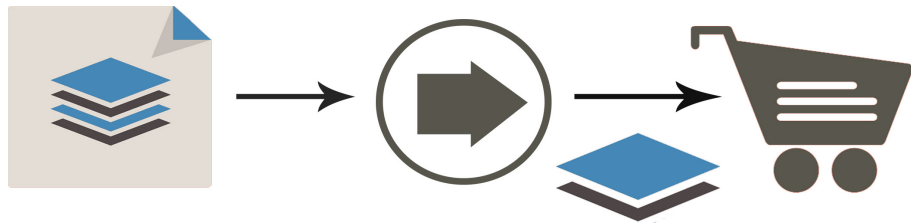


# Don't forget to add Splinter Offers.

Learn more about them at [TheWallStreetLawyer.Com/blog](http://TheWallStreetLawyer.Com/blog)

## 4 OFFER A DOWNSELL

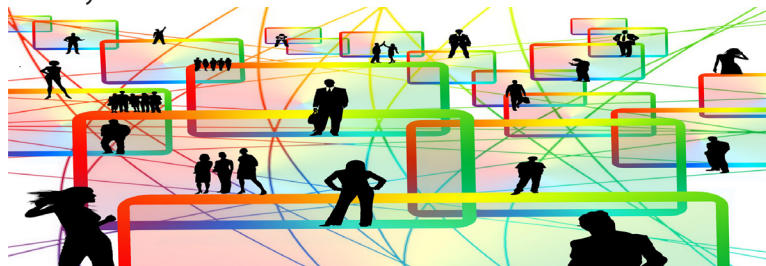
letting people know that if they weren't ready for a complete all-access deliverable, maybe something else is more in line with their needs or budgets.



A downsell shouldn't be viewed as a failure or something to settle for, but instead as an opportunity to maintain a customer even though they passed on a bigger ticket item or service.

## 5 MAINTAIN CONTINUITY

which means bringing people into a membership-based community of products and services they won't find anywhere else.



Build a lasting relationship that creates constant benefits for the consumer to help them maximize the return on their investment.

# Sales Funnel Performance Goals

If you're a solopreneur, you should always be funneling your subscribers into some sort of sale. When was the last time you did a Sales Funnel Performance Review? What Do You Want this Page to Look Like at the End of the Month?

**FUNNEL Name** \_\_\_\_\_

## Lead Magnet Conversion Rate (25 points)

- To Date \_\_\_\_\_
- Last Month \_\_\_\_\_
- This time last year \_\_\_\_\_

## Email Conversion Rate (25 points)

- To Date \_\_\_\_\_
- Last Month \_\_\_\_\_
- This time last year \_\_\_\_\_

## Webinar Conversion Rate (25 points)

- To Date \_\_\_\_\_
- Last Month \_\_\_\_\_
- This time last year \_\_\_\_\_

## Discovery Call Conversion Rate (25 points)

- To Date \_\_\_\_\_
- Last Month \_\_\_\_\_
- This time last year \_\_\_\_\_

Scoring Criteria: Each area is worth 25 points, for a total of 100 points  
1 Not Awesome - 25 Awesomeness

**Total Points:** \_\_\_\_\_

### GRADE RATING

100 A+  
90+ A  
80+ B  
70+ C  
60+ D  
50 and below F

For each area, what do you expect to go well?: \_\_\_\_\_

What are you not certain of going well?: \_\_\_\_\_

What areas might need improvement?: \_\_\_\_\_

What resources have you used to build your funnel?: \_\_\_\_\_



# Sales Funnel Performance Tracker

What did this page ACTUALLY look like at the end of the month, compared to your pre-month goals on the left?

**FUNNEL Name** \_\_\_\_\_

## Lead Magnet Conversion Rate (25 points)

- To Date \_\_\_\_\_
- Last Month \_\_\_\_\_
- This time last year \_\_\_\_\_

## Email Conversion Rate (25 points)

- To Date \_\_\_\_\_
- Last Month \_\_\_\_\_
- This time last year \_\_\_\_\_

## Webinar Conversion Rate (25 points)

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**Total Points:** \_\_\_\_\_

### GRADE RATING

100 A+  
90+ A  
80+ B  
70+ C  
60+ D  
50 and below F

For each area, what went well?: \_\_\_\_\_

What did not go as expected?: \_\_\_\_\_

What areas need improvement?: \_\_\_\_\_

What resources do you have, or can you obtain in order to improve your funnel?: \_\_\_\_\_



# Mini-Business Plan

Answer each question in 1-2 short sentences.

## Overview

What will you sell? \_\_\_\_\_

\_\_\_\_\_

Who will buy it? \_\_\_\_\_

\_\_\_\_\_

How will your business idea help people? \_\_\_\_\_

\_\_\_\_\_

## Ka - Ching

What will you charge? \_\_\_\_\_

\_\_\_\_\_

How will you get paid? \_\_\_\_\_

\_\_\_\_\_

How else will you make money from this project? \_\_\_\_\_

\_\_\_\_\_



## Hustling

How will your customer learn about your business? \_\_\_\_\_

\_\_\_\_\_

How can you encourage referrals? \_\_\_\_\_

\_\_\_\_\_

## Success

The project will be successful when it achieves these metrics:

Number of customers \_\_\_\_\_

\_\_\_\_\_

or

Annual Income \_\_\_\_\_

\_\_\_\_\_

## Obstacle/Challenges/Open Questions

Specific concern or question #1 \_\_\_\_\_

\_\_\_\_\_

Proposed solution to concern #1 \_\_\_\_\_

\_\_\_\_\_

# CONTENT CALENDAR IDEAS

Products Your Are Selling?

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Related Subject Areas Someone Shopping for That Product Would Be Interested in :

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Choose Potential Blog Post for this Theme

	TOPIC 1	TOPIC 2	TOPIC 3	TOPIC 4	TOPIC 5
How To [DIY/Tutorial/ Instructional]:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List [Best of/Top 5/ What To Avoid]:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case Study	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Story	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comparison of 2 or more products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Series	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guest Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# SOCIAL MEDIA CALENDAR

## ≈ The Big List of Ideas ≈

Title	Description	Your Ideas	Title	Description	Your Ideas
<b>MEMES</b> 	Because who doesn't love a good meme? Bonus points if it's relevant to your niche. (Ex: I'm a nerd because social media memes are my life.)		<b>Homework Assignment</b> 	Offer up a homework assignment to help out your followers.	
<b>Question of the Day</b> 	Ask your followers a question about their blog/biz, advice for your blog/biz, or just something fun.		<b>Current Events</b> 	Celebrating holidays and other current events.	
<b>Quick Tips</b> 	Secret tips/hacks forgetting things done.		<b>Behind-The-Scene</b> 	Images of your workspace, projects in the works, etc.	
<b>Tutorials</b> 	How-to's and tutorials to help your followers get something done		<b>Encouragement</b> 	Words of encouragement for your followers.	
<b>Branded Graphics</b> 	Visually appealing graphics with your trademark.		<b>Social-Only Promos</b> 	Discounts/offers on your products/ services that are only for your social media followers.	
<b>Quotes</b> 	Written out quotes or graphics with quotes on them. (If you create your own, add your trademark!)		<b>Calls To Action</b> 	Get followers to sign up for your email newsletter, read your new blog post, or buy your newest product/service.	
<b>Videos</b> 	GIFs, funny videos, inspirational videos, etc.		<b>Reader Survey</b> 	Get follower input on your blog/biz.	
<b>Announcements</b> 	Launches, business news, updates about the biz owner (you!)		<b>Giveaways</b> 	Give away prizes in exchange for likes/ followers.	
<b>Your Blog Posts</b> 	Obviously this is a bit part of your social media strategy—your own blog posts!		<b>Products/Service</b> 	Share info about new products/ services that you're offering.	
<b>Contests/Game</b> 	Caption This photo games, photo, contests, challenges, etc.		<b>Personality</b> 	Include a bit of yourself in your social media by sharing little quips.	
<b>Curated Content</b> 	Helpful links from other bloggers and reputable sources.		<b>Freebies</b> 	Incentives for your social media followers.	
<b>Discounts</b> 	Discounts/offers on products/ services that you offer.		<b>Virtual Events</b> 	Webinars, Twitter chats, and other online things to do.	
<b>Infographic</b> 	Industry-related infographics.		<b>Longer Anecdotes</b> 	Stories, longer tips, and other longer status updates.	
<b>Listicles</b> 	Fun listicles from BuzzFeed or informational ones.		<b>Inspiration</b> 	Inspiration for yourself and your followers.	
<b>Non-Blog Promos</b> 	i.e. webinars, Twitter chats, or collabs you're working on.		<b>Time Sensitive Offers</b> 	Discounts/offers that your followers have to use by a certain date before they expire.	



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