**PREPARED BY: \_\_\_\_\_\_\_\_\_\_\_\_ DATE: \_\_\_\_\_\_\_\_\_**

**My Vision Statement: (How I want to be seen by my customers and my peers)**

Type Here

**My Annual Production Goals: Max Bonus Goals:**

Loans: Type Here Loans: Type Here

DDA / MMA: Type Here DDA / MMA: Type Here

MMKT: Type Here MMKT: Type Here

Analysis Fees: Type Here Analysis Fees: Type Here

**My Deal Targets:**

Minimum Deal Size / Relationship Size: Type Here

Average Deal Size / Relationship Size: Type Here

Ideal Deal Size / Relationship Size: Type Here

# of deals needed to hit goal: Type Here

**For Questions or Coaching Call Ray Adler (760)720-9270**

**My Projected Quarterly Production Targets: (Based On Max Bonus)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Q1 | Q2 | Q3 | Q4 |
| Loans: | Type Here | Type Here | Type Here | Type Here |
| Deposits: | Type Here | Type Here | Type Here | Type Here |
| MMKT: | Type Here | Type Here | Type Here | Type Here |
| Analysis Fees: | Type Here | Type Here | Type Here | Type Here |

**My Target Market(s):**

Type Here

**My Marketing Strategies:**

Type Here

**For Questions or Coaching Call Ray Adler (760)720-9270My Weekly Marketing Activities:**

|  |  |
| --- | --- |
| Number of F/F Initial Prospect Calls: | Type Here |
| Number of F/F Calls to Existing Customers: | Type Here |
| Number of Warm Introductions Asked For: | Type Here |
| Number of Warm Introductions Provided: | Type Here |
| Number of Weekly Meals with Prospects & Customers: | Type Here |

**My Barriers to Success (What will stop me):**

1. Type Here

2. Type Here

3. Type Here

**My Professional Development Goals:**

Type Here

Approved (Banker): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_

Approved (SM): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_

**For Questions or Coaching Call Ray Adler (760)720-9270**