

Building Your Dream Business Checklist



Name: _____ Associate #: _____
Start Date: _____ LevelUp Deadline: _____ Sponsor: _____
Sponsor Contact # _____ ED: _____ ED Contact #: _____



- _____ **Use What:** Your membership, apps and [Member Perks!](#)
- _____ **Use Why:** To become a satisfied customer, you'll WANT to share!
- _____ Call your Provider Law Firm and get advice on something going on in your life. The [15 Areas of Law](#) and [101 Reasons](#) documents will show you all the ways you can use your membership.
- _____ Complete your [Will Questionnaire](#) and send to your law firm.



- _____ **Share Why:** Develop your [5 Passionate Purposes](#) that will inspire and motivate you to want to share the service and opportunity!
- _____ **Share With Who:** Share with people who have the highest probability of wanting our service or opportunity by using the [Top Prospecting Sheet](#).
- _____ **Share the Service:** Present to everyone you care about asap using the [Consumer Script](#). It's simple, it works, and everyone can do it!
- _____ **Share the Opportunity:** Discover the marketing strategy that works best for YOU! The [Wealth Builder's Tracking form](#) will show you multiple ways you can build your business, help you organize every exposure and track your efficiency. Add a **minimum** of 2-10 NEW connections to the form daily to create a successful launch. To share using events, go to the [Events page](#).
- _____ **Share NOW:** Learn about all the latest incentives from your team leaders!



- _____ Use the [PDA Form](#) to keep your business organized, running efficiently and to assist you in the coaching process during your launch phase.
- _____ [Set your goals](#). If you aim at nothing, you'll hit it every time!
- _____ Know and practice the [10 Core Commitments](#) to create success.
- _____ Calculate your potential income with the [Commission Calculator](#).
- _____ Learn how to Performance Club Qualify from your team leader.
- _____ Coach every new associate on how to follow the [ShieldNation Onboarding](#).
- _____ To earn more, you must learn new and productive habits. Use the [Success Habits That Work workbook](#) to create breakthrough results!



- Our goal is to create explosive growth in markets throughout North America by providing services that bring cutting-edge and cost-effective solutions to the local communities. We duplicate ourselves to expand market share. Duplication is the key to wealth! Market share can increase two ways: by increasing sales personally and/or by duplicating yourself by recruiting the following:
- | | |
|---|---------------------------|
| _____ New Sales Associates (PT and FT) | _____ Brokers |
| _____ Associations (Local and National) | _____ Agents and Agencies |
| _____ Niche Market Specialists | |