



Create Your 2026 Midyear Sales and Marketing Plan Class 1 of 2

Welcome to the 2026 Midyear Plan Class!

My name is Eric Lofholm, and I will be your instructor for the next 2 sessions.

I have guided thousands of students through this planning process every year since 2003! I am excited to be here. I am committed to doing my part and providing you the training, encouragement, and inspiration for you to successfully complete your plan.

Your first golden nugget is clarity! The clearer you are the more likely you are to manifest a result.

The purpose of this class is for you to create a written plan for the next 6 months for your business or your sales.

Email me right now:

Subject Line: I commit

Email: I commit to complete my 2026 midyear plan by June 30.

Once your plan is completed you can email it to me for a letter grade of A.

Coaching session for anyone who has not had a coaching session in the last 90 days - <https://planningclass.com/free-consult> Note: if you are a coaching client, we can go over your plan on a future coaching session.

Here are the dates for classes.

- Tuesday, June 9 at 10 am pacific
- Thursday, June 11 at 10 am pacific

The recordings will be available at <http://hubpagereplay.com/>

The 2026 Midyear Planning Class Series is open to the public. You can invite anyone. Here's the link to register: <http://planningclass.com/>

Coaching Program Preview Friday, June 12 at 10 am pacific – Get 10 Clients in 90 days Guaranteed - <https://events.ericlofholm.com/coach-with-eric>

AI Goal Setting Coach - <https://chatgpt.com/g/g-6a27455c17b48191b692defb587ec69c-2026-6-month-goal-setting-coach>

If you have any questions, you can email customerservice@ericlofholm.com

Goal of this class: Create a 1-3+ page 6-month plan by July 1st

Create your 6-month Plan.

What we are going to do today, and Thursday is write out our sales business goals for the next 6 months and create written plans on how we will achieve those goals.

Focus on completion versus perfection.

Let's begin by setting some overall goals of what you want to accomplish over the next 6 months.

Ideas to consider:

- Gross sales goal
- Income goal
- New client goal
- Recruiting goal
- Social media follower's goal

You have 4 minutes to create some 6-month goals. Go!

Now we are going to create monthly goals. Think about what you want your monthly goals to be over the next 6 months.

Consider:

- Monthly gross sales goal
- Monthly income goal
- Monthly new client goal
- Monthly recruiting goal
- Monthly social media follower's goal

You have 4 minutes to create some monthly goals. Go!

Create a Theme for the 2nd half of 2026!

- The Rest of 2026 is the Season of Consistency
- The Rest of 2026 is a Fresh Start
- My Theme is Massive Action

- My Theme is Leverage
- The Rest of 2026 is the Season of Massive Action
- The Breakout Year
- The Rest of 2026 is the Season of Duplication
- The Rest of 2026 is the Season of the Full Practice
- The Rest of 2026 is the Season of my Book being Published

You have 3 minutes to create your theme. Go!

Build association into your plan

- \$250,000 Idea
- Who do you want to JV with, partner with, hire, train with?

You have 3 minutes to identify 2 people you would like to associate with at a higher level.

Sales Math

- What is your income goal?
- What is your annual revenue goal?
- How many calls does it take to book an appointment?
- How many appointments does it take to make a sale?
- How much do you make per sale?
- 20 calls to book an appointment.
- 1 sale for every 3 appointments
- \$5,000 per sale
- \$100,000 income goal
- So we need:
- 20 sales or about 3 per month

Write down how many sales do you need to make to achieve your income or sales goal.

You have 4 minutes. Go!

Focus on Revenue Producing Activities

You have 3 minutes to identify 3 revenue producing activities. Go!