



# Latreia Accountability Pro

*A performance program that drives prospecting consistency & measures outcomes*



# Accountability Statistics

An individual has a **65%** chance of completing a goal if they commit to another person.\*

If you have a specific accountability appointment with someone you've committed to, you will increase your chance of success by **95%.\***

\*The American Society of Training and Development (ASTD)

- 1 | Define what needs to be tracked
- 2 | Set clear goals and measure consistently
- 3 | Review updates on progress
- 4 | Discuss obstacles and roadblocks
- 5 | Recognize and celebrate progress

High value activities + Consistent execution =  
High likely of business success

# The Business Metrics

*Key business drivers & business opportunity outcomes can be customized to specific industries.*

- **Business development driver activities**

Outbound calls made to master database

New contacts added to master database

Number of target referral partners (TRP) that received a touch

Number of target referral partners (TRP) that received a call

Number of target referral partners (TRP) that received a visit

Number of high value networking events attended

- **Business opportunity outcomes**

Number of new leads received

Number of applications generated (leads to application conversion %)

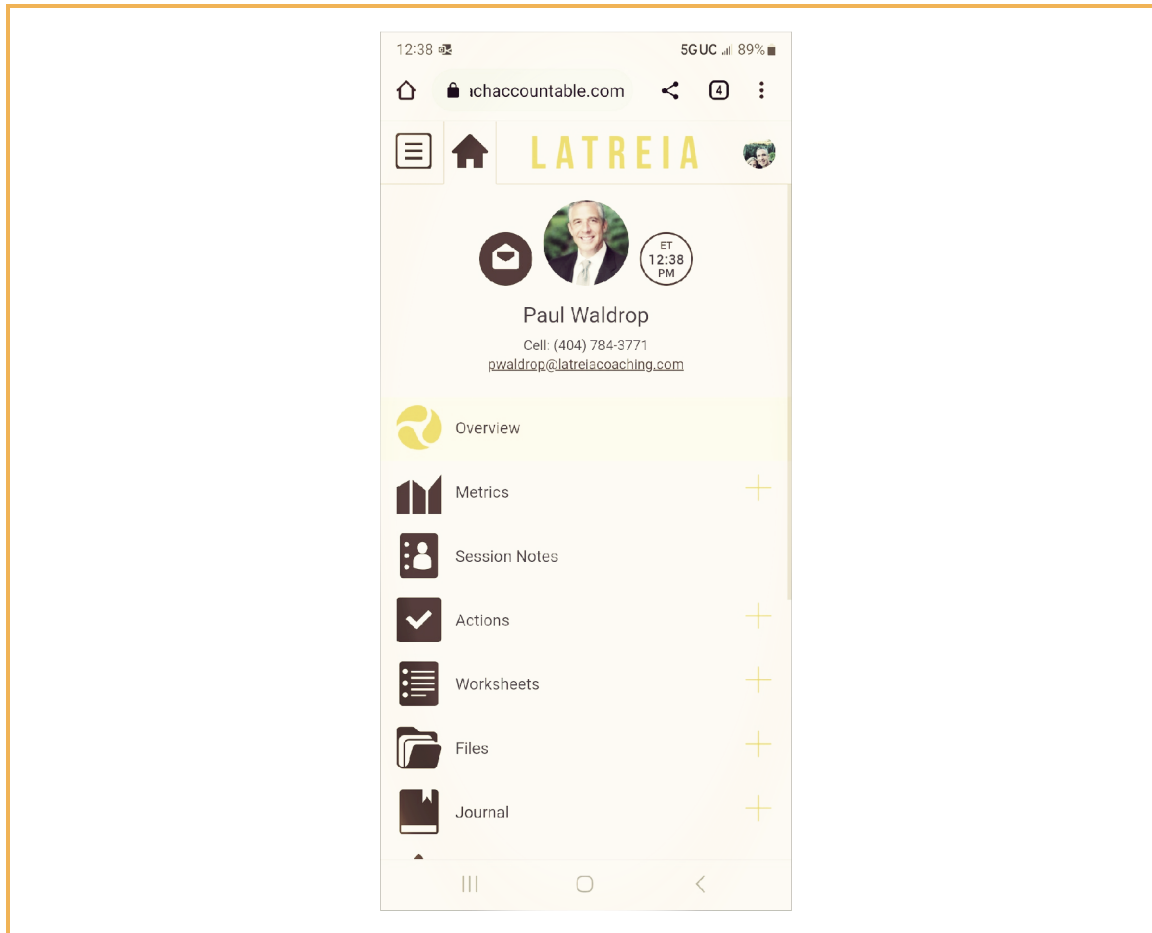
Number of prequals generated

Number of fundings completed (applications to funding conversion %)

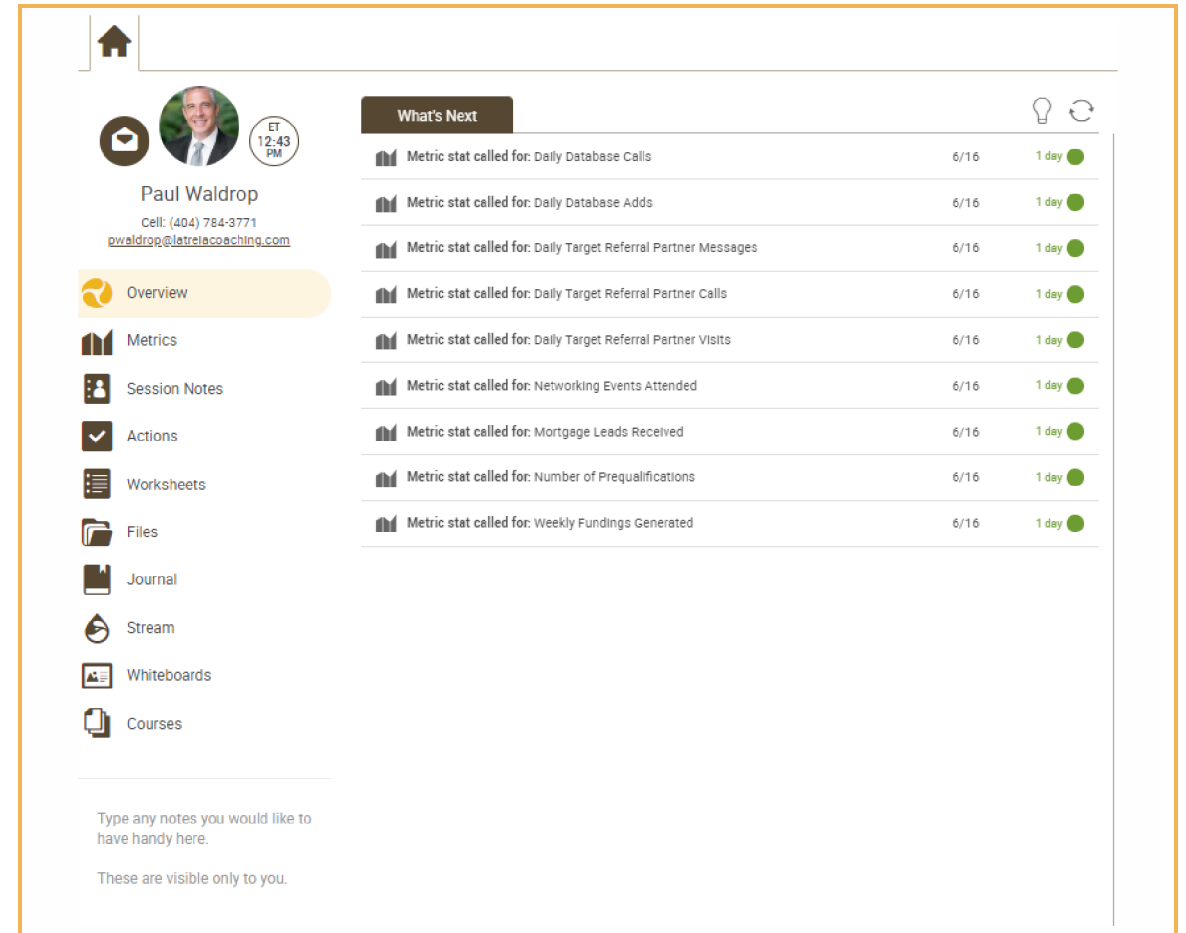


# Latreia Accountability Dashboard

*Each client receives access to a private online performance portal where everything is tracked in one convenient location.*



Clients access their dashboard via mobile device...



Or through their laptop 24/7.

# Latreaia Accountability Tools

*Latreaia Coaching uses multiple tools to keep clients focused on what is most important to their business success.*

**Preview Weekly Energizer: Beginning of the Week**

Let's start (and end) the week right!

What's your BIG goal this month?

Yep, same answer every week this quarter.

What's your weekly goal to move the needle forward on that BIG goal?

In one sentence or less.

Is that weekly goal:

SPECIFIC? ☐ Yes

ATTAINABLE? ☐ Yes

MEASURABLE? ☐ Yes

When you hit this week's goal, how will you reward yourself?

An ice cream for yourself, taking your team bowling, night out with your partner?

*This last question is the most important - having a reward in mind, no matter how small, will keep you moving forward.*

Sent directly to their inbox, clients complete a beginning of week worksheet to clearly identify high value objectives. Coaches provide real time feedback.

**Preview Latreaia Bronze - Daily Prospecting Checklist (A)**

Please take 2 minutes to track how you did on your daily prospecting activities. If you're not done with these yet, but still plan to do them, hold off on marking the Worksheet complete (click "Save" instead). Be sure to complete each day to continue building your confidence.

[clientFirstName] [clientLastName] [dateOf]

**Answers based on today's activities.**

# of calls made to your database\*

# of contacts added to your master database\*

**\*\*Your database** represents a goldmine of business opportunity. Consider everyone you know (in your cellphone's contact list, connections on all social media, social, business and religious groups, past clients, past & current leads, etc.) as part of your master database. This is your sphere of influence (SOI). Each contact probably has 10 more contacts (2nd level). Your objective is to make sure each contact in your first and second level knows: (1) who you are, (2) what you do, (3) what a good lead is, and (4) you are resourceful and passionate about helping people.

# of TRPs\*\* that received a touch

# of TRPs\*\* that received a call

# of TRPs\*\* that received a visit

**\*\*A Target Referral Partner (TRP)** is a referral source that you're interested in doing business with. It can be anyone who is client facing and has a database of contacts. It is wise to do some research in advance so that you can find some common points of interest. Your goal is to build trust in order to grow a business relationship with them. Remember, it goes both ways so as you seek help and referrals from them, think about how you can help and refer leads to them. This simple focus will help you go farther, faster.

**You may or may not feel completely confident or comfortable executing these activities. However, the more you push yourself to complete these each day, the better you will get at them. Do your best but don't give up! We will continue to refine your skills and scripts during our coaching sessions. You can do this!**

Sent directly to their inbox, clients complete a daily or weekly worksheet reporting on their key business driver activities. Coaches provide real time feedback.

**Preview End of Week Reflection**

Dear [clientFirstName],

Take no more than 5-10 minutes to reflect on your week. This can help you process your thoughts on the most important things related to your business and your life.

**What went well this week? Reflect and celebrate!**

**What could you have done better? Reflect and recommit!**

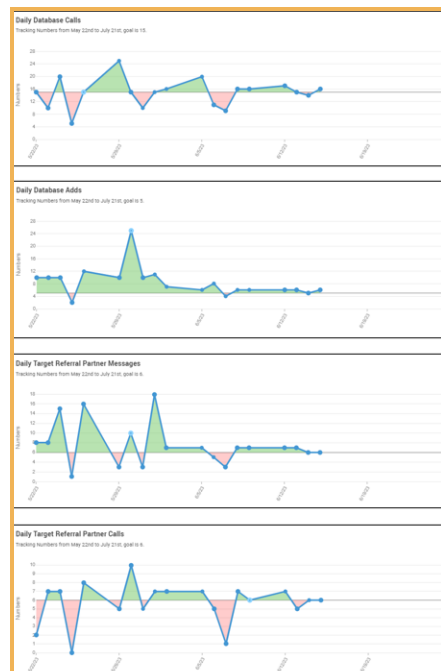
**What are you most looking forward to in the next few days? Resolve to be present in the moment and don't let less important things rob you of your joy!**

**What are you most concerned about facing in the next few days? Resolve to build an action plan and be as prepared as possible. Control what you can control and let go of the rest. Bring someone who cares about you into your world. It will help you find peace.**

**NOTE: This exercise is for you. Feel free to share with your coach but you don't have to. Also consider using the Journal tool on your dashboard. You don't have to share what you write. This is your chance to clear your mind and get centered.**

[coachFirstName]

Sent directly to their inbox, clients complete an end of week reflection worksheet to evaluate their performance. Coaches provide real time feedback.



Data from worksheets are piped directly to client dashboard where cumulative results for prospecting drive activities and business outcome metrics can be viewed.

Client (Daily)	Date	DatabaseCalls (15)	DatabaseAdds (5)	TRPMessages (6)
Brian Walters	5/22/2023	15	10	8
Brian Walters	5/23/2023	10	10	9
Brian Walters	5/23/2023	10	10	8
Brian Walters	5/24/2023	20	10	15
Brian Walters	5/25/2023	5	2	1
Brian Walters	5/26/2023	15	12	16
Brian Walters	5/29/2023	25	10	3
Brian Walters	5/30/2023	15	25	10
Brian Walters	5/31/2023	10	10	3
Brian Walters	6/1/2023	15	11	18
Brian Walters	6/2/2023	16	7	7
Brian Walters	6/5/2023	20	6	7
Brian Walters	6/6/2023	11	8	5
Brian Walters	6/7/2023	9	4	3
Brian Walters	6/8/2023	16	6	7
Brian Walters	6/9/2023	16	6	7
Brian Walters	6/12/2023	17	6	7
Brian Walters	6/13/2023	15	6	7
Brian Walters	6/14/2023	14	5	6
Brian Walters	6/15/2023	16	6	6

Client (Weekly)	Date	NetworkingEvents	LeadsGenerated	Applications	P
Brian Walters	5/26/2023	1	4	2	
Brian Walters	6/2/2023	1	3	2	
Brian Walters	6/9/2023	2	4	2	

Cumulative performance reporting is available for executive leaders and program sponsors. Individual and team reports available.



# Latreia Coaching Accountability Overview

*Program available for a limited time only. Lifetime participation option available.*

- **Business Foundations Training Class**

"Master Your Business Marketing" (45-minute pre-recorded program)

- **Monday Energizer Worksheet**

Identify monthly and weekly goals & their impact on your business

- **Daily/Weekly Business Activity Worksheet**

Submit daily/weekly report of business activities w/ real time feedback

Latreia coaches will reach out if client performance falls below metric standard

- **End of Week Reflection Worksheet**

Identify what worked and did not work during the week. Reflect and recommit.

- **Weekly Touchbase Call**

Regularly scheduled 30-minute virtual call with maximum of 10 clients per session

Review of best practices, recognize opportunities, address obstacles & objections

- **24/7 Client Access to Latreia Coaching Portal**

Private client landing page

Stakeholder reporting

Latreia Coaching is offering this special program for a limited time only. Monthly cost is **\$225** per client for as long as they stay in the program. Non transferrable.

Clients may enjoy access to this program as long as they maintain good standing (fees paid and clients are actively engaged). Program interruption may result in higher pricing upon readmittance.

## Contact us!

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