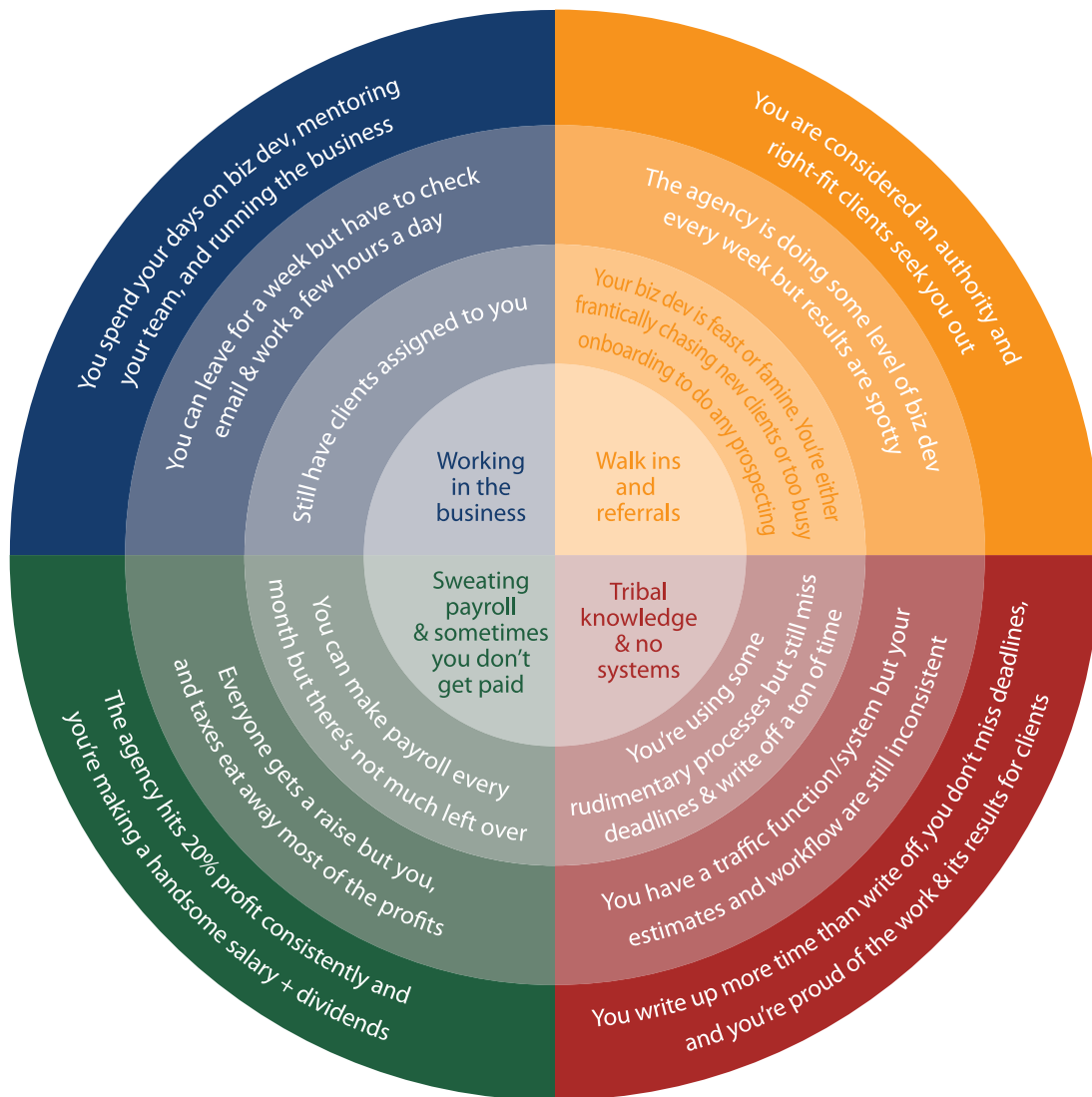
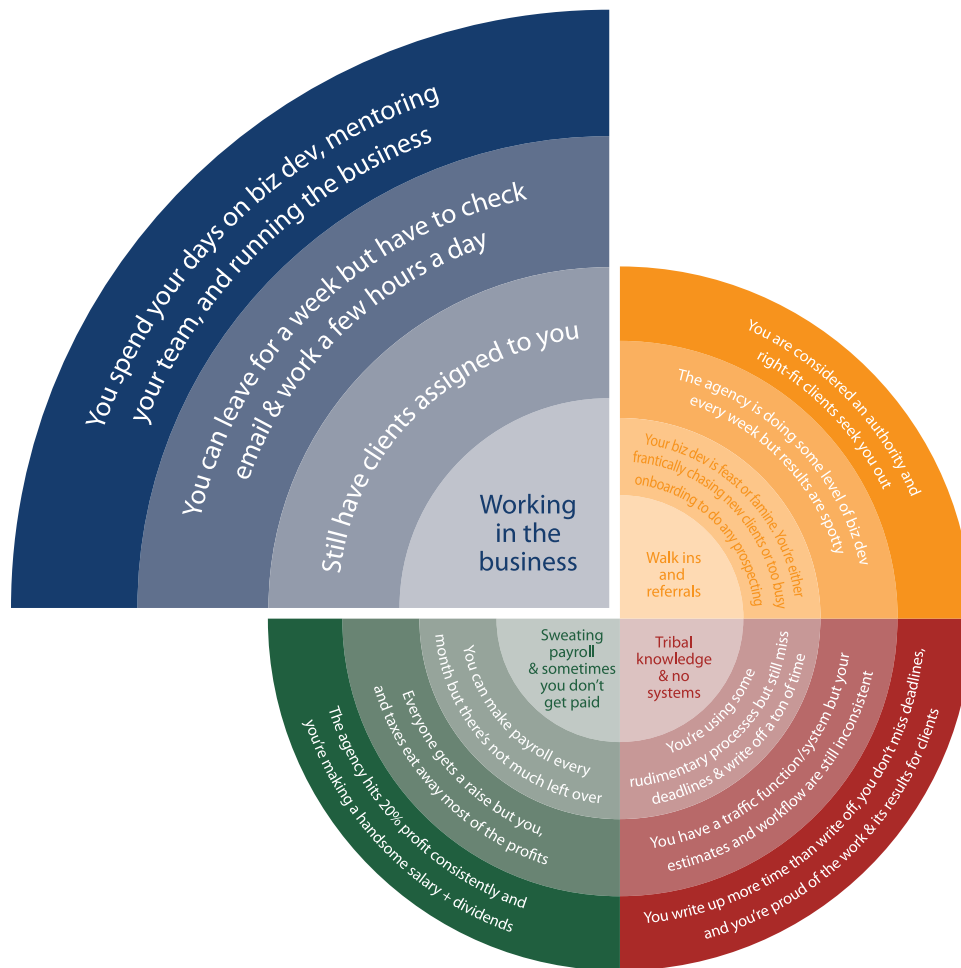


Agency Owners To Do List for 4th Quarter 2020



Leadership



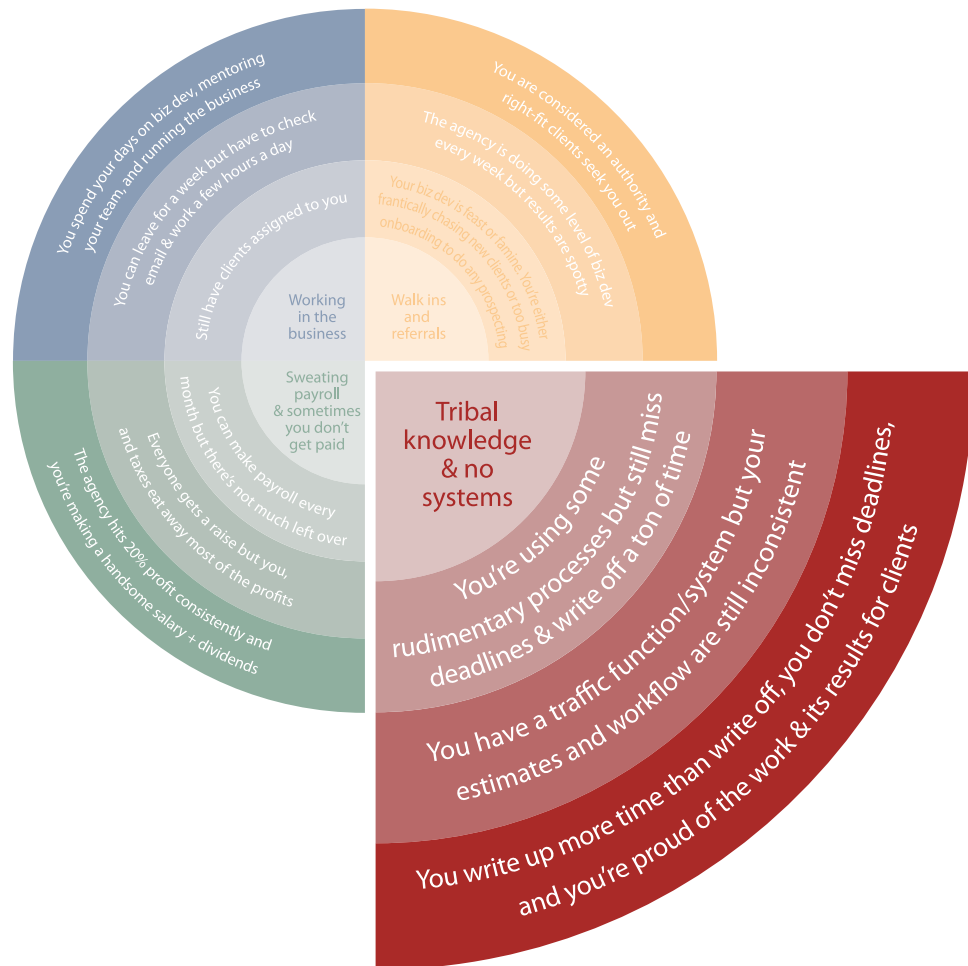
- Know where you're at mentally and emotionally
- Know how to refill your bucket
- Give yourself something to look forward to
- Know where your team is at mentally and emotionally
- Pay attention to how your team members showed up – there's a trading deadline
- At some point – you have to decide what you want your agency to look like and have a plan



What worked during the lockdown? How do you maintain/replicate what worked?

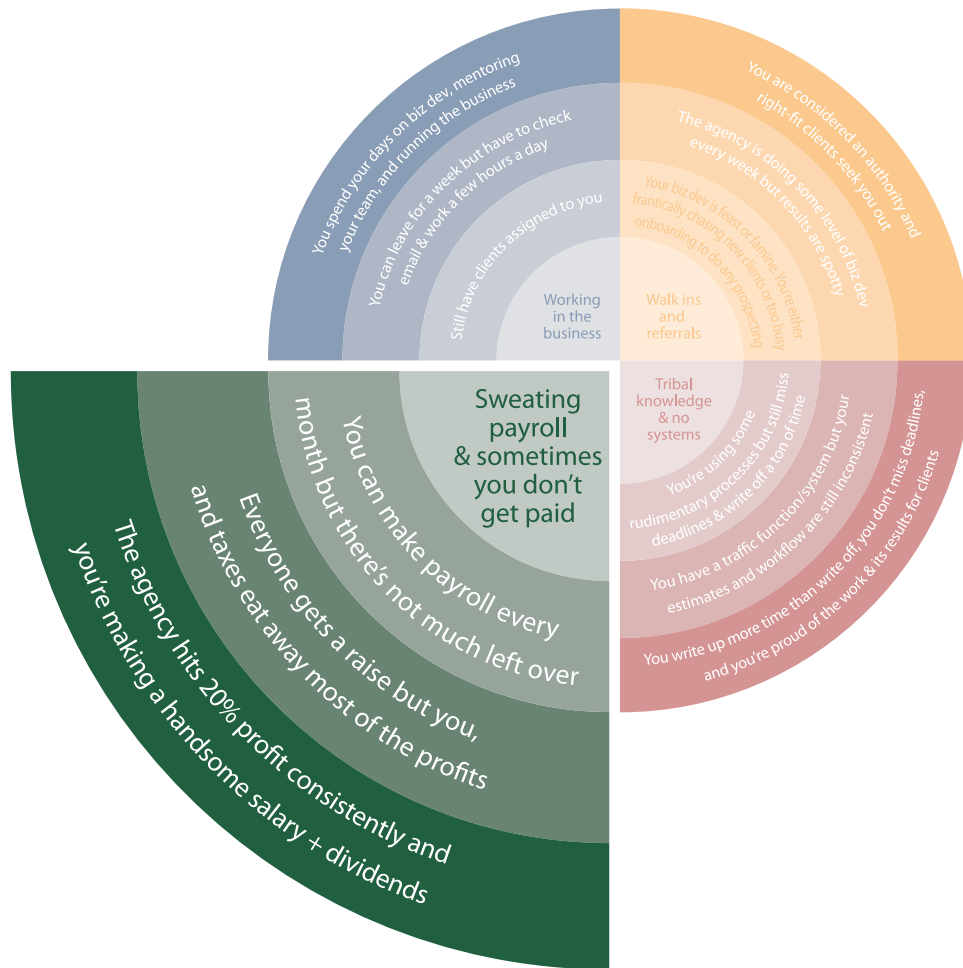
Being findable isn't enough. You need to be sought after. What is your one to many approach? Sell with authority? If not, then what?

Getting it done



- Implement daily time sheets
- Measure on time/on budget
- Track billability/utilization

Money



- Track cash flow – project out 90 days
- Run your 55/25/20 every month
- Decide what profit percentage is acceptable and manage to that
- Meet with your tax advisor before the end of October to deal with PPP money liabilities
- Do not go unpaid. Do not delay difficult decisions. Do not put yourself into a hole
- If you are having a good year – clean up debt and build a nest egg