

A man with long, dark hair and glasses is sitting in a chair, looking off to the side. He is wearing a dark blue long-sleeved shirt. A small, fluffy brown dog is sitting on his lap. The background is a bright, slightly blurred indoor setting.

JAMES SCHRAMKO

3 Critical Stages of an Effective Annual Marketing Plan

Good planning makes marketing campaigns targeted and more likely to succeed. Ron Reich shares how you can shape up an annual plan in three steps.



Ron Reich

James: James Schramko here. Welcome back to my podcast. This is episode 971. We're talking about how to create your annual marketing plan. I've brought along [Ron Reich](#) to talk about this. Hello, Ron.

Ron: Hello, James. I'm so excited to talk to you about, really, one of my favorite topics, planning. So talking to one of my favorite people in the world, you, about one of my favorite topics, this is just early Christmas.

James: One of the reasons I wanted to ask you about it is, I mean, we have had guests before, I think it's a long time ago, actually, I think it was Episode 596. We had [Alan Dib](#) on here talking about his one-page marketing plan, which was a great episode, and it really helped a lot of people at the time.

So firstly, I know it's a topic that's useful. Secondly, having worked with you for quite some time, now I can see you're so good at the planning. Like, we talk about stuff that's coming down the pipeline, you say, I'm going to be doing this launch, or I'm going to be doing this campaign. And then I see all the materials coming through, and then it happens. And I know you've been behind the scenes running launches.

So you're one of those people who is fully aware of the marketing side of it. You do plan, you do execute, which I think is an important part of planning, because it has to be executable. But then when I look in your life, I can see evidence of why. Like, I believe you just got some bodybuilding pictures done right.

Ron: Yes, that's correct. Just a fitness photoshoot.

James: So you don't just show up to the photo studio all ripped, right? I know from having friends in that sort of industry, you've got to eat certain things, you've got to do different routines, etc. on the lead up and then get cut, get all the moisture out and all that sort of - like, I think because you're so used to the discipline of achieving a certain result, you've applied that to marketing.

Why have a marketing plan, anyway?

So I'd love it if you can just tell me about your thinking around the marketing plan. And why firstly, would we consider having a marketing plan? If we're just floating along like a lot of entrepreneurs just reacting to everything that happens to us and go, Gee, I better run a campaign and get a bit of traffic? Or maybe I could shake the tree and get in a couple of affiliates. Why do we want to plan in the first place?

Ron: Yeah, yeah. I mean, you're reminding me of the classic, you'll appreciate this, the whole Zig Ziglar, one of his quotes, like, it's better to be a meaningful specific versus a wandering generality. And yeah, you've hit the nail on the head. It's really interesting to me, because so many people, when it comes to marketing, they really are these wandering generalities where it's like, exactly what you said, it's like, they don't know what to do - like two things, they don't know what to do, so they're kind of not doing it, or some people, they know what to do, but they just cannot get themselves to do it.

The more we can just be intentional about what we're actually going to be planning, of what our actual strategy is, and then on the execution side of things, good things are going to happen. And this is one of those things where, in a lot of ways, you know, marketing, drawing your bases, especially working with the people that you and I typically work with, people who are going from six to seven figures, a lot of that really is, it's a really formulaic process.

It's very, very simple. It's not easy, but it's the ultimate simple but not easy. And if you just execute the plan, if you just do the process, you are going to get good results. And so many people, they just, again, they just don't know what that process is, so they don't do it, or they know what it is, but they don't do it.



So if we can actually take a step back, especially at the beginning of the year, like, you know, 2023, at the beginning of 2023, or at the end of 2022, to actually spend some time just creating our marketing plan, and if we just have that roadmap, then good things are going to happen. You're going to get so much more results by just having a plan in place than if you don't.

And the truth of the matter is that your plan is going to change, but actually planning, the process of planning, that oftentimes is a huge benefit in and of itself.

Does planning take a lot of effort?

James: How much of an effort is it to do a plan? Do you put a timeframe on it? Do you set aside a planning meeting? Do you involve your team? Is it something you do in isolation?

Ron: Yes, so I work with a lean team, as most of my clients do, as I know you do as well. So I typically will actually just spend some time on my own mapping some things out, probably like I might do the kind of thing where I might block out maybe 90 minutes, a couple of hours to kind of map some things out, put some ideas down, then maybe go back to it maybe a couple of days later, or maybe the following week.

And probably the whole process on mine might take maybe two, three hours total. And then we have essentially, have our game plan for how we're going to hit the next year.

Ron's 3-part process behind marketing plans

James: So do you have a process around that? Do you want to share that?

Ron: Yeah, for sure. Very excited to share this with you. So there essentially are, let me just do the math on this, there's actually three main parts to it. First, there's kind of our overall big picture strategic plan, then we create what's called essentially our money map, doing our math, and then we create our actual marketing calendar. That's essentially what those three parts are.

So I'll walk through each of them. I'll do one at a time, then we'll kind of check in on them, because I know we're on the same page with a lot of these types of things.

So the first part of making a marketing plan, whenever I do this for myself, or with a client, it's always about - and I know you do very similar things - it's always about figuring out of course, what is our goal? Where do we want to be when the year ends, in this case?

And then we want to look back, okay, what are the things that are working? And how can we amplify those? How can we enhance those things? How can we double down on the things that work? This is a pretty involved process. But I kind of want to give you a couple of shortcuts. This is kind of like the magical shortcut on how we can really create a marketing plan.

So we want to start by looking at two things. And I know you talk all the time about the 80:20 of the 80:20, the 64:4. There are two things. So go read James's book, great book, [Work Less, Make More](#), for more details on this, but we really want to start by looking at two things.

What offers do the heavy lifting?

You want to look at, what offer or offers are actually doing the 64:4? Where is your actual revenue coming from? If you do this math, you're going to find that you probably have offers that are doing the heavy lifting, that are providing most of the profits in your business. So we want to identify that. You listening to this, this might be really obvious, because you're already like, we have a couple of offers.

But if you have more offers, you want to zero in on that. And then we want to be looking at, so step one is, what's the offer that's doing the heavy lifting?

Determine your best sources of lead gen

Step two is, what are our lead generation sources? What's the 80:20, 64:4 of our best lead generation sources? So we want to be looking at two things there.

We want to be looking at, what's the actual traffic source? Like, are they coming from Facebook ads? Are they coming from partners? Are they coming from like, one specific referral partner? Or what's the 80:20 of your referral partners? Is it coming from organic traffic? Whatever it is, we want to find out what the lead generation source is.

And then, and this is more specific if you're working with clients, if you're not working with clients, if you're just selling digital products or doing e-commerce, this doesn't quite fit as well. But if you're working with human beings, if you're working with clients, you also want to be looking at what are the commonalities of those clients?

Like, do they all live in the same part of the country? Are they all men? Are they all women? If you're a certain kind of coach, are they all in a certain niche, like if you coach businesses for example? And then what that's going to do is if we figure out what our best offer is that's doing the heavy lifting, what our best traffic source is, and what's the commonality of our best leads, our best clients, then we can really just kind of like, do like a laser beam.

We zero in on exactly who we need to focus on to really, really enhance our revenue. That's really the first step. Once we have those in place, then we can go to the next step, and I'll check in with you on your feedback on this.

James: Well, sometimes those things are similar. I was on a call last night, and I looked around my Zoom room. And everybody on the call is in the music industry. I'm like, this is crazy. I've never once gone out marketing for music people. But two things are true. One is they all had music in common.

The second thing is that most of them came from referrals of one of the people in the room. Like, he was having such a good time, he's referred another person and another person and another person, and now, we've ended up with a very specific group. I imagine that would be the good base for being able to go out and create something in my marketing plan around doing more of that.

Ron: Absolutely, for sure. And this is like, you're the king of simplicity. So this is really just, you know, both of us are really about, I know your superpower is making the complex simple. And really just, this is kind of that thing where it's like, okay, if you know that most of your people are in the music industry. Okay, great, let's go get more of those people from that specific guy, make a deal with him, if you have not already.

And also, who's another person that has a similar audience that has a similar reach as him? And get in front of that person and make a deal with that person. And before you know it, I mean, this is really kind of like, everybody's always asking, how do I get more traffic? How do I get more leads? So where you're already getting leads, and just do more of that thing.

James: That's a favorite go to, isn't it? It's like, it's the easiest way to get a fast win with the least amount of risk.

Ron: Absolutely, for sure, one hundred percent. So once we have that in place, because really, we need traffic, right? Everybody wants more traffic, this is kind of how we get more traffic.

Time for the fun math

And then the next part really is doing our fun math, which is, it's good to have this awareness, is figuring out, like, you have your offers in place as well, how many offers like, basically, how many offers do you need to sell in order to hit your revenue goals?

And there's a couple parts to this. So like, if your goal is to make a million dollars, and you have a \$10,000 program, then great, I think that's 100. If you sell 100 of your \$10,000 programs, you will make a million dollars. But let's say that you want to make a million dollars and your program is only \$5,000. That's going to give you some important data.

Okay, that means well, maybe I need to double the price of my \$5,000 program to \$10,000. Or maybe it means that I need to add in, like, a \$25,000 mastermind after people go through my \$5,000 program to hit my revenue goals. So essentially, this is the kind of exercise. It's kind of fun, because, you know, we can kind of look at the numbers and it gets inspiring. But it is an exercise worth doing.

James: Well, the interesting thing is, as you just said, when I've sat down and extrapolated things in a spreadsheet, which I do when I'm starting anything new, I look in the spreadsheet, even a coaching program, you look at a coaching program, what is the amount of the coaching program? How many students can you have?

And then you think, well, how many hours does it take to service that, for example? And you work out what your capacity is. Sometimes, the spreadsheet will kill a plan before it starts, because you realize that even if you got success with the marketing plan, you wouldn't actually be happy with the result.

Ron: Yeah, that's another thing to consider as well, a hundred percent, where it's like, let's use the same example. I'm just confirming your point, which is like, yeah, maybe you do have a \$10,000 program and you have to get 100 people in the program. But you realize you can't or don't want to service 100 clients. Then it's like, okay, maybe we need to...

James: Or maybe we need some sub-coaches, or maybe I could have a \$5,000 program and hire sub-coaches and sell quite a lot more of them, etc.



Ron: Yes, all these types of things. Again, this is where it's like, planning itself is kind of half the battle, because this is going to give you a lot of huge insights. But of course, it is even better too, once we have a plan, to execute said plan.

James: As per Patton's quote.

Ron: What is that?

James: Even a good plan today violently executed is better than a great plan tomorrow.

Ron: Okay, yeah, yeah.

James: Something along those lines.

Ron: Yeah, yeah, yeah. Yes, totally thumbs up on that. I've heard that one before.

James: There's the, if you don't have a plan, then chances are you'll fall into someone else's.

Ron: Yeah, there's that one, yeah, I can't remember who said that one. There's also the, Colin Powell has the one where it's like, which we'll get into, no plan survives the first contact in a combat or worse. Then there's the one that's attributed to Mike Tyson, which is the same idea, which is everybody's got a plan if they get punched in the face.

Okay, we'll get into that a little bit later. But now we're in the fun, easy part of actually just creating our plan. So once we have this in place, then we need to essentially get our marketing in order. And ideally, as part of this, when you do that granular offer and the math offer and math stuff, then we also want to think about, okay, how many leads do I need to get in order to make X amount of programs?

You know, that kind of goes back to our lead generation sources, like for example, just to illustrate this point even more, like, let's say you were getting five leads a month from this musician dude, but you need to get 20 leads a month to reach your revenue goals, okay, that gives us a lot of clarity on what we need to do on a lead generation point of view.

And so once we have that in place, our next thing is really creating our marketing calendar. So now, I think, actually, in our last, go listen to [our previous podcast episode](#), where we talked about kind of combining evergreen marketing, as well as where the live...

James: Well, I got some great feedback on that one, actually.

Ron: Oh, I appreciate that. Great to hear. Yeah, go listen to that one after you're done listening to this one, if you have not already.

James: Nine five four that was.

Make more sales by making more offers

Ron: So I'm going to be talking more about our promotional plan, because our evergreen marketing plan, that's essentially something that's going to be consistent throughout the entire year. And essentially, that's our evergreen ways of getting traffic. We just talked a little bit about lead generation.

And then it's essentially going to be our evergreen content machine. What's the content that we're putting out on a regular basis, essentially on social media and on email. The other part of it is continually making offers on a regular basis in various mediums.



James: And I like that simple, fundamental rule. Like, you want to make more sales, make more offers.

Ron: Absolutely. More offers equals more money. Absolutely.

James: Yup. And it comes up a lot when people are reluctant to send emails or tell people about their products or services. They're just not making offers. So they're not making sales.

Ron: Absolutely. Yeah, this is actually, I'm glad you mentioned this, this is kind of the meta why we do a marketing plan, because by having a marketing plan, it's a living document that kind of exemplifies the offers that we are going to be making, essentially, if that makes sense.

James: Well, for me, it's like we're deciding to put on a symphony. And we're going to engage a conductor and get all the musicians, and we're going to make some great music. You don't just all rock up. It needs some structure and some planning. Otherwise, it's not going to be as good if you go ad hoc.

A lot of a lot of visionary driver entrepreneur types, I think, are fairly ad hoc. If you look at the bottom line for my business, while I'm not a massive planner, and I don't do big seasonal stuff, I have worked out the strategy. I know where my leads come from. And I've worked out the math. And the calendar is very simple for me. It's like, continue to do podcasts, continue to send emails, continue to do great work. That's, even in its very, very simple version, is a plan.

And it's a pre-orchestrated understanding of what's going to happen next year. I know next year, I'm going to continue to publish content, I'm going to continue to send emails, I'm going to continue to improve our social media, especially on the video channels, like YouTube. That's a plan. That's what we talk about with my team.

But I think what you said before, the easy fun part is sticking it in the calendar. Do you think people just skip straight to that step and don't really worry about the strategy or the math sometimes?

Ron: To be honest, I don't think many people create calendars, to be honest.

James: Because I don't think I even create a calendar. All I do is say, well, two podcasts a week, for most of the months of the year, and we want to do a video every day. That's it. Anything above and beyond that, like doing a book or whatever, it takes an enormous amount of extra work on top of it.

Ron: Yeah, yeah, yeah, for sure, yeah. And I would say most people do not even do - because you don't really do a ton of, like, bigger promotions.

James: No, that's why I need to bring you on. I need you to show us, what are other marketers doing? Like, what are all the other people doing? You know, the big takeaway, and you haven't really put a bullet point on this, but I will, is you've introduced the concept that we work out how much money we want to make. And then we work backwards from that on how many offers and how much traffic we need to get.

That's a different way of marketing than some people anyway. So I've often just focused on whose problem can I solve, or what's going to create great value for them? How can I share that with them? And I'm working on that part of the process, and then it adds up to whatever it adds up to. I haven't actually started - although it is fair to say that I have an absolute minimum of seven figures revenue, right?

If for some reason, if it ever dropped below that, and it never has since 2008 when I started full time on my business, then I would definitely start engineering all the way you're talking about.

Ron: [laughs] You'll do some work. Not that you're not working.

James: But I've always worked on the customer problem and the customer side of it or on a Kaizen sort of model, never ending improvement, if we just keep fixing all the links in my chain, the chain gets stronger.

Ron: Well, that's true. Yeah.

Successful people know their numbers

James: So that's one way. And the revenue thing is absolutely, this is the part I haven't been exposed to as much that I really think is fascinating. Of course, when I was at Mercedes-Benz, they absolutely obsessed about this. We had high-ticket accountants in our face every month, benchmarking us against all the numbers, everything was worked down to a percentage and a number and a budget and a target.

We had to do this and then reverse engineer. And we went out and hired sales teams. It was hardcore, proper marketing. So what you're talking about is what all the pros do, all the big companies, they've got their objectives, and then they're reverse engineering what has to be done.



Ron: You took the words right out of my mouth, which is essentially, and I've worked behind the scenes in a lot of big businesses in the kind of an online space, a lot of the bigger players, I've coached a lot of these people, and I will just tell you that the people who make the most money, they obsess about the numbers the most.

James: Yeah, I agree. I've seen it too.

Ron: That's just a fact. So if you want to make as much money as possible, then...

James: This is the way you do it.

Ron: I would encourage you to do it...

James: That's it.

Ron: This is how you do it. Yeah, yeah.

James: It's absolutely true. It's exactly what I'm saying. I've not approached it from the hardcore monetary side of it. It's just for me, it's been a byproduct, a fortunate byproduct of what I'm doing.

Ron: Well, that's awesome. Yeah, what you're doing, it's very evolved and virtuous.

James: Super organic. Right?

Ron: And it is really awesome. Yeah. A hundred percent.

James: But the danger is, you know, it's my podcasts, and I talk about things that I'm doing like, it's not relevant for quite a lot of my audience. People need to hear what you've got to say. You need to sit down and work out what your objective is, and then reverse engineer it, like a military general. And Ron is telling you the way to do it.

So, so far, we've got strategy, math, and the calendar. We've zeroed in on the 64:4, which offers are doing the heavy lifting, which lead sources perform the best, what are the commonalities, how are we going to magnify those? And then we pull out the spreadsheet, and we work out the math, we work out our offer price points, the number of leads we need to get through those traffic channels to convert to the revenue goal that we need.

We decide at that point if we need to modify or change something if it's not going to work at all. And then we get out - and it sounds like we're getting close to the point where we get to put it in the schedule and we plan out, you've got your evergreen, you said, and then there's a promotional.

Ron: Yes, exactly. So the evergreen machine, since we talked about that already, so we do need to go listen to the last podcast for more...

James: Yup, 954.

Making your promotional calendar

Ron: More of the nuts and bolts on that. And then we create, really, our promotional calendar. So I'll give you a framework for our promotional calendar, which I may one day come up with a cooler name for this. Right now, we call this the ABC method of promotions essentially. So we have our (A) promotions, those are essentially our big launches that we might do, really two to three times a year, between two to four times a year, is how many times you do it.

I think three times per year is optimal. That's like three times, we're really going for it, we're making a bigger scene, we might be spending a couple of weeks promoting one of our products, we may or may not be rounding up affiliates. But everybody who listen to this, I would imagine knows what I'm talking about. So those are essentially our big A launches.

James: We've all had them visit our inbox, occasionally.

Ron: Well, yeah, yeah, fair enough. Yeah. But again, they don't always have to...

James: The point is, if you want to make the most money, this is the formula. You need to do two or three big promotions on top of what you're doing.

Ron: Yes. And then we have what we call our B-level promotions. Our B promotions really are a great example that is like a week-long webinar type promotion. Or you might have a webinar that starts on a Thursday, you start promoting it on Monday. And then you might have an offer that's available through the weekend. So that's essentially a B-type promotion.

And then we have our C promotions. Our C promotions are typically shorter. No, they are always shorter promotions, they're typically email-based. We might just be doing a little promo where we're even offering free coaching calls if we work with clients, or maybe just a 24-hour flash sale, or like a Black Friday type sale, kind of what I would call a C-type promotion.

So our rule of thumb is, the way we actually trade our calendar is we put our big rocks in the calendar at the beginning of the year. So these are our two to three bigger A promotions. Whenever we're going to do those, you know, let's say we're going to do one in January, we're going to do one in June, and we're going to do one in December, just to keep things clean and symmetric.

And then the rule of thumb is in between our A promotions, we can really do like a one B-type promotion per month, or really two C promotions equals a B promotion. Does that make sense?

James: Yup, it does. Yup.

Ron: Okay. And to be honest with you, again, we said everybody has a plan, until they get punched in the face. Typically, most of the people I work with and myself included, we do a good job with our bigger A promotions, typically. And really to do like, one webinar promotion every month, it's kind of a lot, you're probably not really going to do like, if you're doing three A promotions per year, and the other nine months, you're probably not going to do like, nine of those.

You might do like maybe, if you could do one every other month, for example, that's cool. And then in between those, just do like these shorter email type promotions. Remember, more offers, more money, like we talked about.

James: Yeah, I mean, I'm a huge fan of C. C is my go to because you've got the stored value in your email list. I do send out appropriate affiliate offers or promotions via my email list on a fairly regular basis, because when I sat down last time, and analyzed my numbers, I realized that affiliate promotions are a higher [effective hourly rate](#).

They support and help my clients when I choose the right partners for them to progress their journey. And I'm filling in the gaps of things that I don't teach. Like this episode, I don't teach launches, for example, or webinars. So it's great to hear that side of the story from someone else, and then we will email out this podcast. So you could basically dial the mix any way you want. In the absence of the Big A, I'm doing a lot more C's.

Ron: Yeah, yeah, absolutely. For sure. So yeah, again, yeah, you mentioned the mix. So this is kind of like, again, the optimum schedule is what I mentioned, like our three A launches, and then we kind of mix up the B and C launches or promotions in the other months. And then really, the exercise here is just fill in the details.

James: And do you do that on a digital version, or you got it on a wall plan or what?

Ron: I'm pretty old school, I just like to use Word docs for this kind of thing. I don't do anything super...

James: And you said you got a small team. Do you share that with the team then, you have a meeting and talk about it?

Ron: Yeah, yeah, yeah. Typically, at the beginning of the year, I'll tell them, This is our promotional calendar for the year. And then every quarter, we'll check in on it. Okay, this is what we have coming up.

James: And you're good at it, man. You talk about it. And then I see it come through. And you said you're a small operation. Like, the inspirational thing here is that you don't need to be a mega corporation, like you don't need 100 staff to be able to do this.

Ron: No, definitely not. Yeah, a lot of it is just showing up and doing the work. Yeah, I mean, especially these days when we're talking about, really when it comes to our "bigger launches", I mean, these days, if you're utilizing social media and just Zoom, like, those two platforms specifically, you can literally do a big A launch.

And I've had clients do this, I've seen people do this, without actually even creating a landing page. You can essentially just have your entire promotion be in a Facebook group and maybe do a webinar on Zoom, for example. So it's like, a lot of the stuff about a launch, there's all this kind of moving parts. That was more true, you know, a few years ago, than it is nowadays, for sure.

Where to go if you need help

James: Definitely changed. If someone wants help from you to do this in their business, you can coach them on this?

Ron: Yes, of course. That is what I do. Absolutely.

James: Where do we get in touch, Ron?

Ron: Actually, I have a special invitation for the listeners of James, if you don't mind.

James: Okay, go for it.

Ron: So we did kind of the Cliffs Notes version of our planning, of our yearlong planning process, but actually have a pretty detailed 90-minute training that I really go through this with specific exercises, and it goes into a little more detail what we talked about today, or actually a lot more detail than what we talked about today.

If anybody wants access to that, there is a little bit of a paywall, but don't be alarmed. For just \$10, you can get access to this full 90-minute training on how to create your marketing plan. And just send me a message on Facebook, just find me on Facebook. I'm sure you'll put a link point here in the podcast.

James: Yep, in the show notes, episode 971, we'll link to [Ron's Facebook profile](#).

Ron: Yeah, just find me Facebook, send me a message and say that you heard me on James's podcast, and you would like access to my special planning training, and I will get access to you for just \$10. The regular price of this that I've seen kind of similar things would probably be, it wouldn't be, it's not a high enough rate, it would probably be 50 bucks or 100 bucks. But for you, because you're a listener of James, \$10, you can get it.

James: Thanks, Ron, I appreciate it.

A recap and final tips

So final tips. You know, hopefully, my recap is fairly on point, strategy, math, calendar. So the end result of this is we've worked out strategically what our business can do, we've verified it with the numbers. And now we've put it into our schedule, and we've briefed our team on it. Is that pretty much about it? And it's going to have a balance of evergreen and promotions.

Ron: Yep, absolutely. And then really, it's just about, last things I'll leave you with here is that if you just execute the plan, you are going to get better results, you will make more money, and your business will grow. And at the same time, like we mentioned, everybody has a plan until they get punched in the face.

And so what I'm getting at there is that you're going to make this plan, but the plan that you have at the beginning of 2023, and when you look back at the end of '23 and look at what you did, you're not going to look at the exact same thing. You are going to iterate and things like that. But again, just taking action and doing the planning really is 90 percent of the battle.

James: Well, I think also, this is critically important. It will protect you a lot from the latest fad or trend or person coming across your bow with their plan. It's like, in the battle of plans, is he with the strongest plan wins, right? If you've got no plan and you're reactive, then you're going to be pitched this, that, the other.

There'll be a new trend, a new thing. There'll be AI, there'll be YouTube, webinars, high ticket, low, you'll be dragged all around the map. But if you have your own plan, you're like, Hang on, let me just check my plan here. No, that's not in my plan. I'll review it next time I sit down for my planning quarterly review, right?

And I talk about this in [my book](#), 12 weeks is a good point to check in and review everything that's come across your desk for the last 12 weeks. Most things are not critically urgent that you need to jump on it today. But if you have a plan, then they are the train tracks that rolls your train along. So you now have direction, and you will get to the next station. So that's why I think it's critical. I even have a chapter about it in my own book.

So, Ron, thank you for giving us this sort of opening up the window of what it looks like for these big professional organizations who are really getting the big numbers. This is exactly the process they're doing. You've brought it to us. I appreciate it. You're coloring in all the spots on what I teach that are not covered right now. So I really appreciate it. That's very complimentary.

And check out [Ron on Facebook](#). We'll give a link to him, and let him know you heard him on Schramko's podcast. And he's very knowledgeable. I follow his content just to see his own planning roll out. He's always doing something. And that's my go-to place to learn about this stuff. So thank you so much.

Ron: Thank you for having me. Always a pleasure.

James: There you go. That's [Ron Reich](#), Episode 971 on JamesSchramko.com. We'll see you next time.

JAMES SCHRAMKO

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