

# Financial Strategies to Scale

## Lever Template



**Acquisition**  
**Qualification**  
**Sales**  
**Service**

Lever	Questions	Action Plan
<b>Acquisition</b>	<p><b>What are your top 3 channels of new clients?</b></p> <p><b>What are 2 to 3 actions you could take to scale those channels?</b>  <i>Example: Buy more ads, explicitly ask for referral, etc.</i></p>	
<b>Acquisition</b>	<p><b>What are 2 to 3 differences you consistently observe between those clients that book and those who don't?</b>  <i>Example: Dates or destinations in mind, willingness to pay a planning fee, etc.</i></p> <p><b>What steps do you already take to qualify your clients?</b></p>	
<b>Sales</b>	<p><b>What is the average time between proposal and sale?</b></p> <p><b>Are there consistent bottlenecks in your process?</b>  <i>Example: Do clients tend to have the same questions or needs before buying</i></p> <p><b>Do you automate any of these processes?</b></p>	
<b>Service</b>	<p><b>How do you communicate with clients between booking and travel?</b>  <i>Example: What is the frequency and method</i></p> <p><b>How do you communicate with clients after their dates of travel?</b>  <i>Example: What is the frequency and method</i></p> <p><b>Do you automate any of these processes?</b></p>	

