



BizFunders

FUNDING AGENT DAILY ROUTINE

PLAYBOOK



Track Consistent & Revenue-Producing Habits

By Funding Agent, Ben Thimas Jr.





The Mission

To help people stop trading time for money.

WHY MOST FUNDING AGENTS FAIL

(And How to Avoid Becoming One of Them)

When I first got started in this business, I struggled. Not because I wasn't capable. Not because the opportunity wasn't real. Not because the system didn't work. I struggled because I treated it like a hobby. And most people do – without realizing it.

Here's why. This is a free business opportunity. No franchise fee. No inventory. No lease. No payroll. And when people don't have skin in the game, they don't show up the same way. They work when they feel like it. They skip days. They "get to it later." They stay busy... but not consistent.

In the Rich Dad Poor Dad book I studied as a former official Rich Dad CASHFLOW Club leader for Robert Kiyosaki, the lesson was simple: The poor and middle class trade time for money. The rich build systems that work for them. Top producers don't rely on motivation. They rely on routines. They don't ask: "Do I feel like it today?"

They ask: "What does the system require today?" That's leadership.

THE REAL REASON MOST AGENTS DON'T WIN

Most agents don't fail because they lack talent. They fail because they lack structure and accountability. No routine = no momentum. No momentum = no confidence. No confidence = no conversations. No conversations = no deals. Eventually they say:

"This doesn't work."

When the truth is... They never ran the business like a business.

WHAT THIS PLAYBOOK IS (AND ISN'T)

This playbook is not about doing more. It's about doing the right things, consistently. It gives you: A simple daily routine. Clear actions to focus on. A way to hold yourself accountable. A standard to operate like a professional. It does not promise instant results. What it does promise is this: If you follow this routine at least 5 days per week, you give yourself a real chance to win.

THE DIFFERENCE BETWEEN HOBBYISTS AND LEADERS

Hobbyists wait for motivation. Leaders follow a system. Hobbyists ask, "Will this work for me?" Leaders ask, "Did I work the system today?"

This routine is how you stop trying... and start operating like a Funding Agent. Not someday. Not when it feels right. Starting now.

Turn the page.

Follow the routine.

Check it off daily.

This is where consistency starts.



HOW TOP FUNDING AGENTS ACTUALLY WIN (Without Burning Out or Getting Overwhelmed)

Most agents think success comes from doing more. More calls. More posts. More effort. More hours. That's how people burn out. Top producers think differently. They don't focus on more. They focus on repeatable.

In Rich Dad Poor Dad, one of the biggest lessons was this: It's not how hard you work. It's whether what you're doing compounds. Funding agents who win don't wake up guessing what to do. They follow a daily rhythm.

THE DAILY BORING ROUTINE PRINCIPLE

You don't need to win the month today. You don't need to close a deal today. You don't need to feel confident today. You only need to complete the boring routine today.

When you do that:

- Confidence follows action
- Conversations follow consistency
- Deals follow conversations

This boring routine is designed to:

- Remove decision fatigue
- Eliminate procrastination
- Build momentum even on low-energy days

That's how professionals operate.

WHY DAILY HABITS BEAT BIG GOALS

Goals are emotional. Habits are mechanical. Most people quit when motivation fades. Systems don't care how you feel.

When you check off daily actions:

- You stop questioning yourself
- You stop overthinking
- You stop "starting over"

Momentum replaces motivation.

YOUR ONLY STANDARD

You are not measured by:

- How much you know
- How excited you are
- How confident you feel

You are measured by one thing: Did you complete the boring routine today? If yes — you won. If not — tomorrow is your reset. No guilt. No drama. No excuses.

HOW TO USE THIS PLAYBOOK

- Follow the daily checklist
- Track it at least 5 days per week
- Check it off using the [Revenue Activity Tracker](#)
- Review your consistency weekly

That's it. This isn't about perfection. It's about showing up like a leader. Turn the page. This is the daily boring routine.

Consistency starts here.



THE FUNDING AGENT IDENTITY (Read This Every Day)

Every business has two parts:

1. What you do
2. Who you become by doing it

Most people focus on tactics. Top producers focus on identity. Being, doing and having.

They don't ask:

- "What should I try today?"

They ask:

- "What would a professional do today?"

THIS IS HOW TOP FUNDING AGENTS THINK

A Funding Agent doesn't wait to feel ready. A Funding Agent doesn't need permission. A Funding Agent doesn't rely on motivation. A Funding Agent follows a system.

Read these statements slowly:

- I create conversations, not excuses
- I measure progress by actions, not outcomes
- Consistency is my advantage
- I treat this like a business, not a hobby
- I show up even when it's uncomfortable or boring

This is what leadership looks like when no one is watching.

WHY IDENTITY MATTERS MORE THAN TALENT

Talent is inconsistent. Confidence comes and goes. Identity is stable.

When you decide: "This is who I am now" Your behavior follows. You stop negotiating with yourself. You stop skipping days. You stop restarting every Monday. You just execute.

YOUR JOB IS SIMPLE

You are not here to:

- Be perfect
- Impress anyone
- Close a deal every day

You are here to:

- Follow the routine
- Track the habits
- Build momentum



That's how cash flowing assets are built.

READ THIS BEFORE YOU START EACH DAY

You don't need a good day. You need a complete day. Complete the routine. Check it off. Move on. The results will catch up. Turn the page.

This is the daily boring routine checklist.

THE FUNDING AGENT DAILY (BORING) ROUTINE (This Is How Momentum Is Built)

This routine is the minimum standard. If you complete this, you win the day. You do not need to do everything perfectly. You only need to check the boxes.

DAILY MINIMUMS

Target time: 45–75 minutes total

REVIEW YOUR PIPELINE (5 minutes)

- Open your Prospecting / Funding Tracker
- Identify who needs follow-up today
- Decide your focus market for the day

Clarity before action.

START NEW CONVERSATIONS (15–25 minutes)

- Plant 5–10 Biz Fund Ready postcards (Direct message,, mail, text, email, or in-person)

Rules:

- Local target market
- No pitching – just conversations
- Consistency beats volume

Momentum starts with conversations.

FOLLOW UP (10–15 minutes)

- Complete at least 5 follow-ups on prospects who've taken evaluation **ASAP**.
- Past conversations, renewals, or “checking back in”

Follow-up is where deals are made. Most people avoid this step. Leaders don't.

CREDIBILITY ACTION (5–10 minutes)

- One public action:
 - Post
 - Comment
 - Share insight
 - Make a referral intro

This builds trust before people need funding.

LOG & CHECK IT OFF (5 minutes)

- Log today's actions using the routine link
- Update your prospect tracker if needed

Tracking turns effort into accountability.

THE STANDARD

You are expected to complete this routine at least 5 days per week – whether full-time or part-time. Miss a day? No guilt. No drama. Tomorrow is the reset. Complete the routine. Check it off. Move on. Turn the page to learn how to track this digitally and stay accountable.



HOW TO TRACK YOUR ROUTINE (This Is Where Accountability Is Built)

Effort without tracking feels busy. Tracking turns effort into momentum. This is not about micromanagement. It's about self-leadership.

THE DAILY CHECK-IN

Each day you complete the routine, you will check it off at: [Revenue Activity Tracker](#)

The check-in takes less than 2 minutes.

WHAT YOU'LL TRACK DAILY

You are not tracking results. You are tracking behavior.

Each check-in records:

- Did you review your pipeline?
- Did you start new conversations?
- Did you complete follow-ups?
- Did you take a credibility action?
- Did you log your activity?

You'll also enter:

- Number of new conversations started
- Number of follow-ups completed

That's it.



WHY THIS MATTERS

Most people think they're consistent. Tracking removes the guesswork. When you track:

- Patterns become visible
- Confidence increases
- Excuses disappear

You stop asking: "Am I doing enough?" And start seeing: "I'm showing up."

THIS IS HOW LEADERS OPERATE

Professionals don't rely on memory. They rely on systems.

Checking off the routine:

- Builds discipline
- Builds credibility
- Builds leadership habits

This is how hobby behavior becomes business behavior.

ONE SIMPLE RULE

If you didn't check it off, the routine doesn't count. Not because we're strict—because standards matter. Turn the page. This is how weekly momentum is created.

WEEKLY REVIEW & MOMENTUM (This Is How You Stay in the Game)

Daily habits build momentum. Weekly reflection **locks it in**. You don't need to overanalyze.

You just need to review.

WEEKLY CHECK-IN (10 MINUTES)

At the end of each week, ask yourself:

- How many days did I complete the routine?
- Which action created the most responses?
- Where did I hesitate or avoid discomfort?
- What felt easier this week than last week?
- What will I repeat next week?

Write it down. Clarity compounds.

WHAT MATTERS MOST

Momentum is not about deals closed this week. Momentum is about consistency maintained.

Some weeks you'll get:

- Responses
- Appointments
- Submissions

Other weeks you'll get:

- Confidence
- Skill
- Reps

Both count.



THIS IS HOW PROFESSIONALS THINK

Professionals don't quit because of a slow week. They don't panic because of silence. They look at one thing: **Did I follow the system?** If yes – stay the course. If no – fix the habit, not the opportunity.

THE COMPOUND EFFECT

When you stack weeks of consistency:

- Conversations become natural
- Follow-ups feel normal
- Confidence stops being emotional
- Leadership becomes visible

This is when:

- Deals show up
- Referrals increase
- Recruiting gets easier

Not because you tried harder—because you stayed consistent.

THE STANDARD GOING FORWARD

Your only commitment is this:

- Follow the routine
- Track it at least 5 days per week
- Review weekly
- Improve one thing at a time

That's how real businesses are built.

This playbook works if you work it.

Turn back to Page 7.

Run the routine again tomorrow.

STANDARDS, EXPECTATIONS & THE LEADERSHIP PATH

(Read This Carefully)

This routine is not optional if your about this funding life. It is the minimum standard for anyone who wants real results in this business.

THE STANDARD

To be considered active and serious, you are expected to:

- Complete the daily routine
- Track it at least 5 days per week
- Review your consistency weekly

This applies whether you are:

- Full-time
- Part-time
- Brand new
- Experienced



Consistency is the requirement. Not hours. Not hype.

WHAT THIS ROUTINE UNLOCKS

Agents who follow this routine consistently earn:

- More confidence in conversations
- Better follow-up discipline
- Clearer momentum tracking
- Increased deal flow over time
- Natural recruiting credibility

People don't follow titles. They follow behavior. This routine builds the behavior of a leader.

WHAT HAPPENS IF YOU DON'T FOLLOW IT

Nothing dramatic. No lectures. No pressure. No chasing. But understand this: If you skip the routine, you are choosing to stay inconsistent and trade your time for money.

Inconsistency creates:

- Doubt
- Frustration
- "Almost" results
- Starting over again and again

That's not a system problem.

That's a habit problem.

THE LEADERSHIP PATH

This routine is how leaders are identified.

Agents who:

- Show up daily
- Track consistently
- Review weekly
- Improve gradually

Are the ones who:

- Get more support
- Get more responsibility
- Get more opportunity
- Are trusted to lead others

Leadership starts before the title.



FINAL REMINDER

You don't need to be perfect. You don't need to be confident. You don't need to be successful yet.

You only need to be consistent.

Complete the routine.

Check it off.

Repeat.

That's how this business is built.

This playbook is the system.

The system works when you work it.

— **Ben Thimas Jr.**

Founder of the DAC BizFunders Team



BONUS LESSONS BELOW



The 80/20 Reality

Why Most Funding Agents Quit Too Soon

Most people don't fail in business because they aren't capable. They fail because they misjudge progress. They expect effort to equal immediate results. Real businesses don't work that way. In the real world, results are uneven. That's not a flaw in the system. That is the system.

The 80/20 Rule (Pareto Principle)

In almost every business: 80% of your results come from 20% of your actions. The other 80% of actions feel slow, boring, and unproductive. But they are required to uncover the 20% that pay. Most people quit inside the 80%. Top producers stay long enough to reach the 20%.

What This Means for Funding Agents

You will: Have conversations that go nowhere. Send outreach that gets ignored. Follow up with people who say "not now." **Do the work without immediate validation.** That does not mean you're doing it wrong. It means you're sorting reality, not forcing outcomes.

The Biggest Mistake New Agents Make

They ask the wrong question.

✗ "Why isn't this working yet?"

✓ "Am I doing the right actions consistently?"

If the actions are right, time does the rest. Your routine exists to keep you executing long enough for the math to work.

The Truth About Momentum

Momentum doesn't show up first as money. It shows up as:

Confidence

Repetition

Pattern recognition

Better conversations

Faster follow-ups

Money follows discipline, not motivation.



Read This Twice

"If you judge today's effort by today's results, you will quit a business that rewards patience."

The purpose of this playbook is simple: **Keep you in the game long enough to win.**

Turn the page.

The 100-10-3-1 Rule

Why Funding Is a Numbers Game (Not a Talent Game)

Most people believe success comes from being persuasive. That's wrong. Success comes from working the math long enough.

A Rich Dad Lesson Reality

In business, you don't convince. You sort. Here's the simple math every Funding Agent must accept: Every Month:

- 100 small business owners see your outreach
- 10 take a Funding Readiness Evaluation
- 3 request a consultation
- 1 qualifies and gets funded

That's not pessimism. That's reality-based math.

Why This Rule Matters

Most agents quit because they talk to:

- 5 businesses
- get 0 deals
- and assume something is wrong

Nothing is wrong. They just didn't plant enough seeds.

Business Is Farming, Not Hunting

Amateurs hunt one deal at a time. Professionals plant fields. You don't get angry at soil because one seed didn't sprout. You plant more seeds. Same rule applies here.

What the 100-10-3-1 Rule Protects You From

This rule prevents:

- Emotional rollercoasters
- Desperation selling
- Overthinking conversations
- Quitting too early

You stop asking: "Will this person fund?" And start asking: "Did I complete today's actions?"

The Only Question That Matters

You don't control outcomes. You control:

- Outreach volume
- Follow-ups
- Consistency
- Tracking

If you plant 100 seeds every month, the math always produces results.

Read This Carefully

"The person who wins isn't the smartest. It's the one who stays consistent long enough for the numbers to catch up." That's why this boring routine exists. Turn the page.



The Prospect Awareness Pyramid

Why “Not Now” Doesn’t Mean “Never”

Most Funding Agents believe prospects are either:

- Ready
- Or wasting their time

That belief kills momentum. The truth is simpler — people move through stages.

The Reality of Small Business Owners

At any given moment:

- 60% are NOT problem aware. (They don’t realize funding or cash flow is a bottleneck.)
- 20% are problem aware. (They feel the pressure but don’t know their options.)
- 17% are information gathering. (They’re researching quietly and comparing solutions.)
- 3% are ready to act now. (These are the deals everyone thinks “should” happen immediately, which are slim to none.)

Why Most Agents Fail Here

They talk to someone in the 60% and expect 3% behavior. That mismatch creates frustration.

Your Job Is NOT to Convince

Your job is to:

- Identify where the prospect is
- Provide the next logical step
- Stay visible until timing aligns

Funding Agents don’t push. They position.

What “Not Interested” Usually Means

It usually means:

- Not yet
- Not educated
- Not urgent
- Not prioritized

Very rarely does it mean “never.”

This Is Why Follow-Up Is Everything

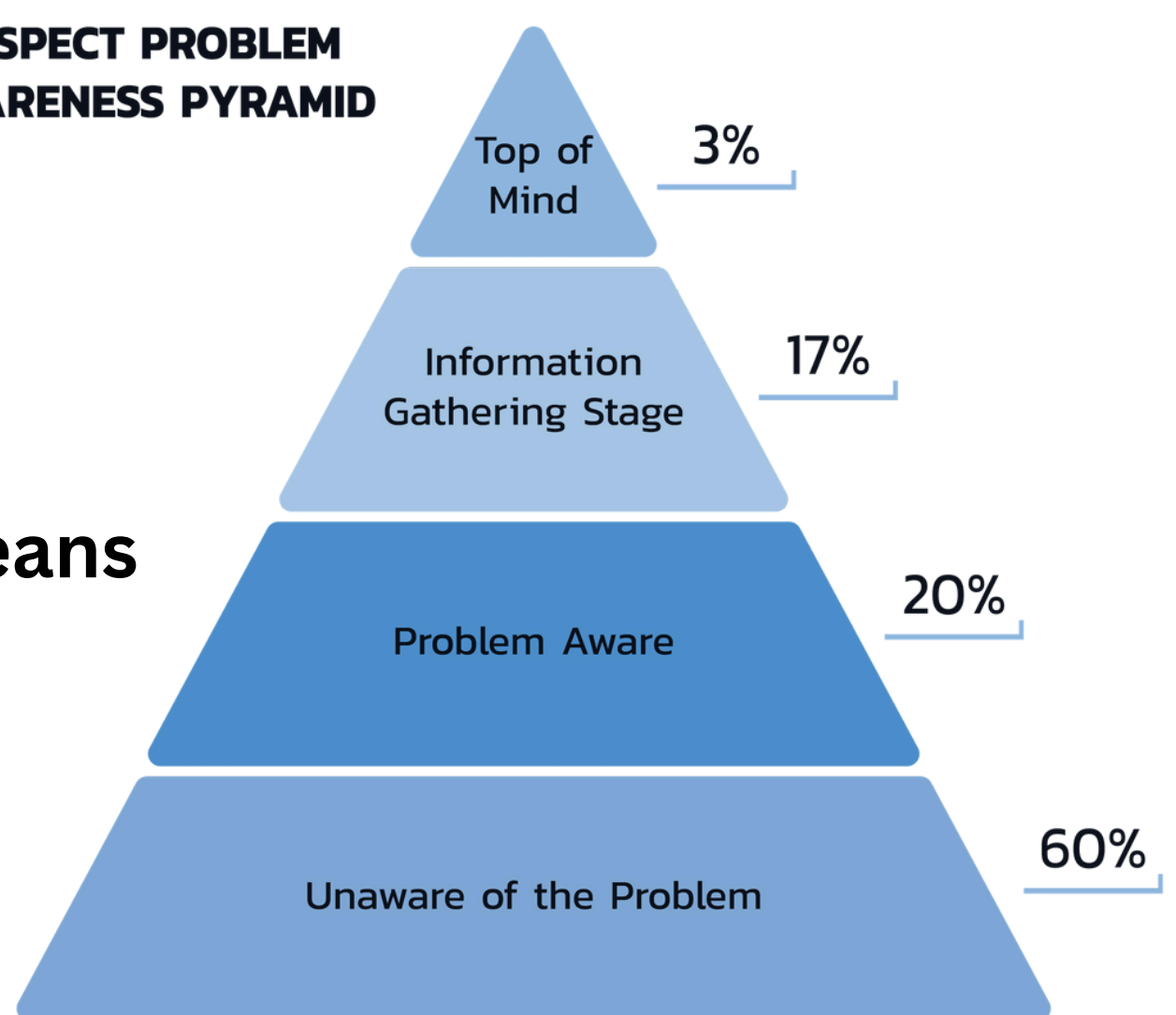
The fortune isn’t in the first conversation. It’s in:

- The second
- The third
- The reminder email
- The postcard they see again
- The moment pressure increases

Consistency beats persuasion.

Read This Twice “Timing creates deals. Consistency captures them.” Turn the page.

**PROSPECT PROBLEM
AWARENESS PYRAMID**



WHY SOME AGENTS MOVE FASTER (And Why It Feels Easier)

Think of this business like walking versus using an escalator. You can walk up the stairs. You'll still get to the top. But it takes more time. And more effort. ALF is the escalator.

You're still moving. You're still responsible for showing up. It's just faster and easier.

WHAT ALF ACTUALLY DOES

ALF – Agent Lead Flow – removes friction.

It helps by:

- Bringing opportunities to you
- Reducing time spent searching for conversations
- Making follow-up easier
- Creating more chances to apply the routine

Same routine. Same standards. Less resistance.

WHY IT FEELS DIFFERENT

Without leverage, progress feels slow.

With leverage:

- Conversations happen sooner
- Momentum builds faster
- Confidence grows quicker
- The business feels lighter

You're not working harder. You're working smarter.

THIS IS OPTIONAL – BUT POWERFUL

You can succeed without ALF.

Many agents do. But if you want this business to feel:

- Faster
- Easier
- More predictable

ALF exists for that reason.

NEXT STEP (WHEN YOU'RE READY)

If you're not plugged into Agent Lead Flow yet and want to explore it: ✉ ben@1800bizfunds.com

Request a consult.

Ask questions.

Decide with clarity.

Consistency moves the business forward. Leverage makes it faster and easier.

