



# **Getting Started with** The 555 Leadership Planner™

*for Financial Services Managers*

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## Introduction

### What is the 555 Leadership Planner™?

The 555 Leadership Planner™ is the cornerstone of creating and maintaining the right environment to achieve a successful and fulfilling career in leadership.

After years of development and test marketing, a recurring theme surfaced. High performing managers indicated their success was based on targeting specific recruiting and development activities performed on a daily/weekly basis. Here is their formula for success: 5 Recruiting Contacts per day; 5 Initial Interviews per week; and 5 Joint Sales Calls per week. This planner (and it's name) evolved from what became known as the 555 formula.

As a manager your primary objective is to recruit and retain productive producers through key tasks relating to recruiting and selection. Regardless of whether you subscribe to the 555 formula, what matters most is that you have clear goals in these areas and you commit to achieving them.

The **555 Leadership Planner™** puts the control of your business in your hands, by keeping your goals in front of you at all times (both consciously and subconsciously) and keeping you focused on the activities necessary to achieve them.

This guide (as well as your planner) is designed to follow our four-step process:

1. **Focus** on what you want to achieve and why you want to achieve it
2. **Plan** on how to get there by defining your business plan with specific action steps
3. **Execute** on the plan's high payoff activities by posting your goals weekly; keeping score daily; and tallying your numbers at the end of the week, month, quarter and year.
4. **Maintain** the process and measure your progress over time through regular reviews with your manager or mentor.



© 2006 Sales Activity Management, Inc.

Whether you are new to management or a veteran, the **555 Leadership Planner™** is designed to direct your focus on what matters most in order to attract, develop and retain successful producers.

## What is Sales Activity Management?

It is a philosophy and a strategy that empowers its users to have more confidence and better control of their own success by providing a performance road map to get on track and stay on track. It is the belief that we all have the potential to achieve great things and that activity management doesn't leave success to chance. Here is a more complete definition:

**Sales Activity Management:** the self-empowering process of identifying, managing and measuring high-payoff sales activities in order to continually improve results.

By using the principles of activity management you will achieve a better understanding of your business. You will be able to see both the activities that are driving your results, as well as identify where bottlenecks are occurring. Your manager or mentor can play a crucial role in clearing any bottlenecks by helping you to diagnose them and develop solutions.

## Three Principles of Sales Activity Management

These are the three guiding principles of sales activity management:

- Sales is a numbers game (Quantity)
- Quality activities produce quality results (Quality)
- What gets measured tends to get done – and improve (Measurement)

By measuring the quality and quantity of sales activities you'll gain a solid understanding of your practice and where your strengths and opportunities for improvement lie. Activity management is a career long commitment. You should avoid the mistake of thinking that activity-tracking is only necessary during the early years of your career. Discipline is a career-long commitment that can pay big dividends.

Although activity management will certainly improve your performance when implemented correctly, it is not a panacea. We can't forget that the financial services business is first and foremost a people business. Remember that you are behind the numbers and at the end of the day, those who establish the best relationships and see the most people, will succeed.

Finally, you must accept the fact that you are ultimately responsible for your own success. It has been said that destiny is not a matter of chance, but one of choice. It is the activities that you choose to perform that will ultimately shape your destiny, and you are the one who is responsible and in control of those activities.

We wish you the greatest of success, and trust that eScoreBoard will help you achieve it. We have included the following recommended readings to help you get started.

*The Spirit to Serve, by J.W. Marriott*  
*E-Myth, by Michael Gerber*  
*As a Man Thinketh, by James Allen*  
*Think & Grow Rich, by Napoleon Hill*  
*The Common Denominator of Success, by Albert E.N. Gray*

## Business Planning (FOCUS AND PLAN)

**Business Planning** is divided into two sections that will help you formulate and capture your goals and strategic plans for the upcoming year; the Simple Business Plan and the Strategic Recruiting and Development Plan. While the complete instructions are in your planner, each section below explains the components to be completed in the Business Planning Process.

### The Simple Business Plan

The first section of Business Planning is the **Simple PGA (Purpose, Goals, Action) Business Plan**. Planning your goals is the first step in achieving “focus” in your business and the Simple Business Plan can get you started. The Plan is brief by design and was developed for you to capture the four primary elements of your business plan, not to take the place of more complete plans that may be provided by your company. It includes the following areas:

1. Personal Mission
2. Business Vision
3. Guiding Principles
4. Business and Professional Goals.

### Strategic Recruiting and Development Plan

The second section of Business Planning is the **Strategic Recruiting and Development Plan**. This plan is broken down into the “5 Elements of Determination” (A – E) which are intended to provide clarity on your tasks and daily activities in order to achieve your goals. Each step is clearly laid out and is accompanied by detailed instructions.

#### **A. DETERMINE YOUR RECRUITING GOAL**

Managers must determine how many producers by unit they expect to hire and retain at year end, and base their recruiting activities on the gross number of starters. Enter your recruiting goal, subtract for attrition and make sure the retained number (net) is in line with your goals.

<b>Starter Goal (gross)</b>	<i>minus</i>	<b>"Attrition"</b>	<i>equals</i>	<b>Retained Appointments (net)</b>
_____	-	_____	=	_____
Sample: 8	-	2	=	6

#### **B. DETERMINE AND PRIORITIZE RECRUITING SOURCES**

You must possess a clear sense of where you will be acquiring the names of prospective candidates. A general rule is to focus in on three active (warm) sources and three passive (cold) sources to start with, and to specialize on one or two that you are extremely excited about and execute very well. Enter your sources and projections in the space provided below.

<b>Warm Sources</b> <small>Center of Influence - Agent/Staff Referral - Current Customer - Personal Observation</small>	<b>Projected Starters from Source</b>	<b>Cold Sources</b> <small>College Recruiting - Job Fairs - Career Seminar - Internet Recruiting - Advertising - Outplacement Center</small>	<b>Projected Starters from Source</b>
1		1	
2		2	
3		3	

**C. DETERMINE RECRUITING ACTIVITY GOALS**

A key component of achieving a long term goal is to identify and map out the activities necessary to achieve it. Recruiting is no different...you must be clear on what it takes. Here are the four key steps needed to calculate your recruiting activity goals:

STEP 1. DETERMINE THE RECRUITING ACTIVITY NEEDED TO HIRE ONE (1) PRODUCER (STARTER)								
Starter Goal	New Names	Recruiting Contacts	Tests Given	Tests Passed	1st Interviews	Offer Interviews	Pre-Contracted	Starters

In Step 1, determine your Goals for the recruiting activities needed to hire one Producer (Starter)

This grid is to determine the Annual Recruiting Activity needed for your annual goal in Retained Appointments. For example if your annual goal in Retained Appointments is 10, then multiply the activity numbers inserted in Step 1 grid by 10.

STEP 2. CALCULATE THE ANNUAL RECRUITING ACTIVITY NEEDED TO ACHIEVE YOUR RECRUITING GOAL								
Starter Goal	New Names	Recruiting Contacts	Tests Given	Tests Passed	1st Interviews	Offer Interviews	Pre-Contracted	Starters

In order to determine your weekly recruiting goals, you will need to divide each annual activity goal (previous grid) by the number of available recruiting weeks. **If you don't already know your recruiting weeks available for the year**, you will need to turn to the Planning Calendar and block out the days and weeks you anticipate not working toward your recruiting goal such as holidays, company meetings, conferences, vacations, training and personal days, etc. and calculate above. Starting with 52 weeks, subtract those unavailable and write in the number of available recruiting weeks and complete the above calculations.

STEP 3. DIVIDE ANNUAL RECRUITING ACTIVITY GOALS BY THE AVAILABLE RECRUITING WEEKS								
Starter Goal	New Names	Recruiting Contacts	Tests Given	Tests Passed	1st Interviews	Offer Interviews	Pre-Contracted	Starters

**Total Weeks**    *minus*    **Unavailable**    *equals*    **Recruiting Weeks**  
 \_\_\_\_\_    -    \_\_\_\_\_    =    \_\_\_\_\_  
 52

STEP 4. CALCULATE APPLICABLE SKILL RATIOS (RRR - REALISTIC RECRUITING RATIOS)				
New Names to 1st Interviews	1st Interviews to Offers	Offers to Pre-Contracted	Pre-Contracted to Starters	New Names to Starters

The key to recruiting success, just as in sales, is doing it well and doing it often. In other words, your activity has to be sufficient in both quantity and quality. You already had to consider skill ratios when determining your recruiting activity goals, because many numbers are interrelated. For example, tests passed is a percentage of tests given, offer interviews is a percentage of tests passed, and starters is a percentage of those pre-contracted, etc. Here you can convert those numbers from a percentage to a ratio, so that you know exactly how many of each category it takes to obtain one of another, i.e. 3:1, and where you need to improve. To calculate your Skill Ratios, simply divide the first category by the second as listed in the title bar. For example, 53 New Names divided by 25 First Interviews equals a 2.1:1 ratio. It is especially powerful to know the final number, that of how many new names it takes to start one new producer (based on your mix of recruiting sources).

#### D. DETERMINE YOUR DEVELOPMENT ACTIVITY GOALS

WEEKLY DEVELOPMENT ACTIVITY GOALS		
PEP / 1-on-1 Sessions	Joint Sales Calls	Joint Sales Calls FYC

WEEKLY UNIT PERFORMANCE GOALS		
Solo Appointments	Applications	First Year Commissions (FYC)

In a way, we saved the best for last. It is our belief that if your producers are receiving stellar development training from their leaders and are having great production success, retention will go up and recruiting becomes both easier, and less impending.

**Step 1. Development Activity** - The challenge with determining development activity goals is it is more subjective than recruiting activity, and it may be difficult to obtain historical numbers. Here are a few guidelines you can use to estimate your goals: One (1) PEP or 1-on-1 coaching session per producer per week; One (1) Joint Sales Call per producer (\*LOS 1 or 2) per week for an average of Five (5) total per week for your unit; One or two (1-2) Phone Clinics per producer (\*LOS 1 or 2) per month or as needed.

**Step 2. Unit Performance** - The ultimate measuring stick to determine the effectiveness of your development activity is your unit's retention and performance. Once again, these are fairly subjective and will also depend on how many of the producers in your unit that you choose to track on a weekly basis. In general, you will probably want your producers to have ten to twelve (10-12) appointments per week, which you will multiply by the number of producers you are tracking. Remember, you will have to subtract out any joint sales calls from that number to arrive at the solo appointments calculation. FYC will depend on your producer's market segment and tenure.

*\*Table: LOS stands for Length of Service, and can be otherwise stated as Class A, Class B or Freshman, Sophomore, to represent a producer's first and second year, etc.*

#### Focus on retention

It is our belief that if you focus on retention then everything else falls into place. When producers receive the right coaching, development and training, the production (and ultimate success) will follow and they stick around. This eases both the annual recruiting pressure (since you'll retain more starters) and helps you live up to the promises you made to your producers during the recruiting process.

## E. DETERMINE THE PROFILE OF YOUR IDEAL PRODUCER

And finally, the fifth element (not included in your Strategic Recruiting and Development Plan) is to determine your ideal candidate/producer profile. Similar to producers qualifying their ideal prospect/client, it is critical for you to have a clear vision of the candidate you are looking to hire. This will assist you in your recruiting activities and interviews, especially when you are communicating to potential nominators the qualities and attributes you are looking for in candidates they refer to you.

The profile is also helpful if your firm discusses candidates during weekly management team meetings (or if you have a recruiting board of directors), so you can compare to candidate(s) you are proposing for hire.

We'll break the candidate profile into two sections, characteristics and background, which are based on industry best practices:

### **Characteristics**

- Drive
- Perseverance
- Honesty
- Dedication
- Winning attitude
- Professionalism
- Desire
- Respectability
- Intelligence
- Discipline
- Loyalty
- Acceptable appearance & mannerisms
- Determination
- Manageability

### **Background** (*Minimum Background Requirements*)

- Stability
- History of past success
- Schooling and scholastic record
- Solid financial circumstances
- Successful work history
- Supportive environment (family, friends, etc.)
- Personal ownership of life insurance and investment products.
- Strong natural market and/or marketing/networking mentality



# Activity Management (EXECUTE)

Now that you have set the mark by completing your business plan, it is time to execute your plan and keep score. The process is simple using the Week-At-A-Glance Pages that make up the bulk of your planner.

1. Keep Your Goals in the Forefront - Post your goals weekly
2. Keep Score Daily - Record your activity daily
3. Tally your daily numbers at the end of the week
4. Transfer your weekly numbers to your Monthly Recruiting and Activity Record in the Business Management Section of the Planner.
5. Insert your weekly numbers into the eRecruitBoard™

**THE 555 LEADERSHIP PLANNER™**

**JANUARY**

Activity Goals	# of New Names Added	RECRUITING ACTIVITY		Candidates Interviewed	Pre-Contracted Total	YEAR-TO-DATE		
		Contacts	Teles Given			Pre-Contracted Total	Starters	Starters Retained

Week 1

MONDAY, January 4th	TUESDAY, January 5th	WEDNESDAY, January 6th
7:00	7:00	7:00
7:30	7:30	7:30
8:00	8:00	8:00
8:30	8:30	8:30
9:00	9:00	9:00
9:30	9:30	9:30
10:00	10:00	10:00
10:30	10:30	10:30
11:00	11:00	11:00
11:30	11:30	11:30
12 Noon	12 Noon	12 Noon
12:30	12:30	12:30
1:00	1:00	1:00
1:30	1:30	1:30
2:00	2:00	2:00
2:30	2:30	2:30
3:00	3:00	3:00
3:30	3:30	3:30
4:00	4:00	4:00
4:30	4:30	4:30
5:00	5:00	5:00
5:30	5:30	5:30
6:00	6:00	6:00
6:30	6:30	6:30
7:00	7:00	7:00
7:30	7:30	7:30
8:00	8:00	8:00

**GOAL POSTING (Top)**

**SCHEDULING (Middle)**

**SCOREKEEPING (Bottom)**

PERSONAL GOALS

PROFESSIONAL GOALS

**2010**

JANUARY 2010

DEVELOPMENT ACTIVITY	PERSONAL PRODUCTION			LEADERSHIP ROLES	
	1-on-1's	Sales Calls	Call/FYC	Recruiting	ment

SUN MON TUE WED THU FRI SAT  
 3 4 5 6 7 8 9  
 10 11 12 13 14 15 16  
 17 18 19 20 21 22 23  
 24 25 26 27 28 29 30  
 31

**"Inspirational Moments"**  
It has been my observation that most people get ahead during the time that others waste.  
*Henry Ford*

THURSDAY, January 7th	FRIDAY, January 8th	SATURDAY, January 9th
7:00	7:00	7:00
7:30	7:30	7:30
8:00	8:00	8:00
8:30	8:30	8:30
9:00	9:00	9:00
9:30	9:30	9:30
10:00	10:00	10:00
10:30	10:30	10:30
11:00	11:00	11:00
11:30	11:30	11:30
12 Noon	12 Noon	12 Noon
12:30	12:30	1:00
1:00	1:00	1:30
1:30	1:30	2:00
2:00	2:00	2:30
2:30	2:30	3:00
3:00	3:00	3:30
3:30	3:30	4:00
4:00	4:00	4:30
4:30	4:30	5:00
5:00	5:00	5:30
5:30	5:30	6:00
6:00	6:00	6:30
6:30	6:30	7:00
7:00	7:00	7:30
7:30	7:30	8:00
8:00	8:00	8:00

**SUNDAY, January 10th**

10:355

1st INTERVIEWS SET

JOINT SALES CALLS SET

DEVELOPMENT ACTIVITY	PERSONAL PRODUCTION			LEADERSHIP ROLES	
	1-on-1's	Sales Calls	Call/FYC	Recruiting	ment

MON TUE WED THU FRI SAT SUN  
 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

**PERSONAL PRODUCTION STATISTICS**

Developer	Customer	Revenue	New Clients

**Post Your Goals Weekly**

At the top of the page post your Recruiting Activity goals on the left side and your unit's Development Activity goals on the right. As long as you are on track you can simply restate your numbers which you formulated from your Recruiting Action Plan. If you are not on track, you will want to recalculate your weekly activity goals as needed.

**Left Side**

	RECRUITING ACTIVITY				YEAR - TO - DATE (Goal/Actual)			
	# of New Names Added	Contacts	Tests Given	Candidate Interviews	Pre-Contracted Total	Pre-Contracted Active (Net)	Total Starters	Starters Retained
Activity Goals:								

**Right Side**

DEVELOPMENT ACTIVITY			PERSONAL PRODUCTION			LEADERSHIP HOURS		
PEP / 1-on-1's	Joint Sales Calls	Joint Sales Calls FYC	Solo Appts	Apps.	Paid FYC	Recruiting	Development	TOTAL

**Keep Score Daily and Tally at the End of the Week**

On a daily basis, using the scorekeeping grids at the bottom of the page, post your completed recruiting and unit development activities. Then, at the end of week, tally your daily scores so you can transfer them to the recruiting and development records in the back of your planner (see Business Management section).

*Note to eRecruitBoard Users: After you have tallied your weekly numbers, go to [www.eScoreBoard.com](http://www.eScoreBoard.com), log in and input your weekly numbers.*

	RECRUITING ACTIVITY										Tests Given	Candidate Interviews
	New Names	RECRUITING CONTACTS										
MON												
TUE												
WED												
THU												
FRI												
SAT												
TOTAL		TOTAL CONTACTS										

DEVELOPMENT ACTIVITY			PERSONAL PRODUCTION				LEADERSHIP HOURS			Mileage	Expenses
PEP / 1-on-1's	Joint Sales Calls	Joint Sales Calls FYC	Solo Appts	Apps.	Paid FYC		Recruiting	Development	TOTAL		
						MON					
						TUE					
						WED					
						THU					
						FRI					
						SAT					
						TOTAL					

**Activity Management - Additional Tools and Resources**

**Monthly Planning Calendar**

Your monthly planning calendars (one for each month) are where you can plan out your month in advance to transfer to your week-at-a-glance pages. Build the habit of viewing the next month's calendar on the last Monday of the current month. This will allow you to plan and organize for upcoming events (or holidays) so you can approach the upcoming month knowing how many actual working days you have available. As you receive flyers, brochures and notices promoting events you wish to attend post the information to the appropriate month in this part of your planner.

Monthly Planning Calendar						
JANUARY 2010						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1 <i>New Year's Day</i>	2
3	4	5	6	7	8	9

**Next Year's Annual Calendar**

This convenient calendar for the next year will allow you to do your long range planning by inserting client business meetings, agency, company and industry meetings, and other business and personal events.

2011 PLANNING CALENDAR							
	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
JANUARY							1 <i>New Year's Day</i>
	2	3	4	5	6	7	8
	9	10	11	12	13	14	15

**Memory Jogger List for Leads and Referrals**

This one-pager reminds you where to find prospective producers, nominators and centers of influence.

MEMORY JOGGER LIST FOR LEADS AND REFERRALS			
Professional	Centers of Influence	Personal	Hobbies/Sports
Accountant	Accountant	Alumni Associations	Bowl With
Ad Agency	Attorney	Anniversary	Hunt With
Allergist	Dentist	Barber/Beautician	Golf With
Attorney	Doctor	Carpenter	Fish With
Bank Loan officer	Headhunter	Caterer	Tennis With

**1-on-1 Meeting Agenda**

Perhaps the most powerful leadership tool available to you is the 1-on-1 meeting. This agenda has been designed to provide structure to keep you and your producers on track as well as setting clear expectations for their development. Make plenty of copies for your use throughout the year.

Note: If your company provides a similar form be sure to use it in lieu of this form.

<b>SAM 1:1 Meeting Agenda</b> (PEP Session-555)		Week ____: ____ - ____
Rep/Agent: _____	Minimum Monthly FYC \$ _____	Manager: _____
Part 1: Open Dialogue		
How are you doing? Are there any special topics you'd like to discuss at the end of our meeting? (List on reverse side)		
What good things happened and what went well last week? _____		

## Business Management (MAINTAIN)

The Business Management Section is made up of scorecards and forms which enable you to become more effective in your planning process and goal achievement..

### Top 25 Draft Choices

Use this form to improve your focus by identifying your most favorable candidates.

TOP 25 DRAFT CHOICES				
NAME	PHONE	OCCUPATION	DATE OF LAST CONTACT	POTENTIAL CONTRACT DATE

### Monthly Recruiting and Development Activity Record

The most popular of the tracking forms, this two page form keeps you focused on your two primary activities; Recruiting and Development. The left side is your recruiting “pipeline” to track your current list of candidates. On the right you can post the development activities for the active producers in your unit. Along the bottom of these pages are the weekly ScoreCards for your recruiting and producer development activities.

#### Things to pay attention to:

- Confirm adequate volume of Prospective Candidates to meet monthly levels established in your Strategic Recruiting and Development Plan
- Verify average length of time from 1st Interview to Pre-Contract date to Contract date. Determine if time periods are acceptable.
- Notice if there is consistency and identify trends with regard to ScoreCard activity.

Recruiting Activity										MONTHLY RECRUITING AND				
PROSPECTIVE CANDIDATES			TESTS ADMINISTERED	TEST SCORES	DATE OF SELECTION INTERVIEWS			PRESENT OCCUPATION RESIDENCE C/S/Z	COLLEGE DEGREE (+GPA)	IDENTIFIABLE NATURAL MARKET (Y/N)	PRE-CONTRACT DATE	CONTRACT/ START DATE		
NAME	PHONE #	SOURCE OF CANDIDATE			1ST	2ND	OFFER							
1														
2														

  

DEVELOPMENT ACTIVITY RECORD														
NAME of Producer / Rep	PEP SESSIONS OR 1-ON-1'S				JOINT CALLS		PHONE CLINICS ATTENDED				*EDUCATIONAL SESSIONS			
	WEEK 1	WEEK 2	WEEK 3	WEEK 4	Name / Result		WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 1	WEEK 2	WEEK 3	WEEK 4
1					Challenges		Solutions		Accomplishments (Will Do's)					
COACHING NOTES:														
2					Challenges		Solutions		Accomplishments (Will Do's)					
COACHING NOTES:														

  

Development Activity ScoreCard										
WEEK ENDING	DEVELOPMENT ACTIVITY				PERSONAL PRODUCTION			LEADERSHIP HOURS		
	PEP / 1-on-1's	Joint Sales Calls	Joint Sales Calls FYC	Educational Sessions	Solo Appointments	Applications	Paid FYC	Recruiting	Development	Total

**Recruiting and Development Activity Summary**

Enter and view, monthly and quarterly activity totals to identify trends to adjust (when necessary) your activity levels to make sure you achieve your annual goals.

**Things to pay attention to:**

- Efficiency Ratios: assure that you are maintaining the right levels of activity established in your Strategic Recruiting and Development Plan. Determine any issues that may be keeping you from hitting your objectives and reflect on whether it is a skill or a will issue. Seek the training and/or coaching you need to overcome any obstacles to hitting your objectives.
- Effectiveness Ratios: Evaluate whether your ratios are in range of your agency/company averages. Make adjustments and seek training and coaching as needed.

RECRUITING & DEVELOPMENT ACTIVITY SUMMARY FOR 2010																	
MANAGER _____																	
	RECRUITING ACTIVITY							YEAR - TO - DATE (Goal / Actual)				DEVELOPMENT ACTIVITY			LEADERSHIP HOURS		
	# of New Names Added	Contacts	Tests Administered		1st Interviews	2nd Interviews	Offer Interviews	Pre-Contracted Total	Pre-Contracted Active (Net)	Total Starters	Starters Retained	PEP / 1-on-1s	Joint Sales Calls	Joint Sales Calls FYC	Recruiting	Dev.	TOTAL
Given			Passed														
JAN																	
FEB																	

  

Efficiency Ratios					Effectiveness Ratios				
Time Period	Recruiting Contacts per Day <i>Example - 3</i>	New Names per Week <i>Example - 40</i>	1st Interviews per Week <i>Example - 3</i>	Joint Calls per Week <i>Example - 5</i>	New Names to Offer Interviews	Offers to Pre-Contracted	Pre-contracted to Starters	Average FYC per Associate	Joint Call Closing Ratio
1ST QUARTER									
Year-to-Date									

**The Recruiting & Retention Record**

As we have discussed, when you focus on retention everything else falls into place. The Recruiting & Retention Record is your tool to calculate your rolling retention rate each month and by class at the end of the year.

**Things to pay attention to:**

- Are you on track for your hiring goals? Can you hit your recruiting goal by October?
- How are your retention numbers per each class year of hire? To achieve a 4 year retention rate of 25% you need the following retention rates: Freshman 85%; Sophomore 53%; Junior 70%; Senior 80%.

RECRUITING & RETENTION RECORD FOR 2010												
FOR <input type="checkbox"/> UNIT OR <input type="checkbox"/> AGENCY												
MANAGER _____												
MONTH	NUMBER OF PRODUCERS							Rolling Retention Rate	# OF PRODUCERS AS OF 1/1/10 =	REPS QUALIFIED FOR CLUB		
	Starters (Contracted) this Month	RETAINED TO DATE (by Class)									Net Gain or Loss (YTD)	REPS QUALIFIED MDRT
		A (LOS 1)	B (LOS 2)	C (LOS 3)	D (LOS 4)	Other Classes	All Starters/Classes					
	Beginning of Mo.	End of Month	Beginning of Mo.	End of Month	Beginning of Mo.	End of Month	Beginning of Mo.	End of Month	Beginning of Mo.	End of Month		
JANUARY											%	

**Recruiting Source Summary**

Knowing which recruiting sources are yielding the best results is extremely valuable as you are monitoring your recruiting goals. The Recruiting Source Summary allows you to review and make adjustments (increase/decrease) to your efforts (as necessary) throughout the year.

**Things to pay attention to:**

- Which sources are yielding the most hires?
- Which yield the most productive hires?
- What are your trends? Are there months that yield more hires vs. low or no hires?
- What recruiting activities preceded good hiring months?

RECRUITING SOURCE SUMMARY FOR 2010													
MANAGER							LOCAL OFFICE						
TYPE OF ACTIVITY	RECRUITING CONTACTS												Total Contacts
	Center of Influence	Agent / Staff Referral	Current Customers	Personal Observation	College Recruiting	Job Fairs	Career Seminars	Internet Recruiting	Advertising	Outplacement Center		Other	
Annual Goal													
JAN													

**Unit Performance Record**

The Unit Performance Record is ideal for completing your Annual Business Plan. It helps you segment your unit’s production by recruiting class so you can estimate production for the following year.

UNIT PERFORMANCE RECORD FOR 2010							
MANAGER				LOCAL OFFICE			
FIRST YEAR COMMISSIONS							
MONTH	A CLASS	B CLASS	C CLASS	D CLASS	E CLASS	FYC STANDARD	
						STD.	% OF STD.
JANUARY							

**Business Record**

Using the Business Record you can track your personal production and income for the year. Make additional copies as needed.

BUSINESS RECORD															Time Period: _____	
Date Written (Mo/Day)	CLIENT NAME	INITIALS		Source	*Product(s) Sold	SUBMITTED BUSINESS					With Check	PAID BUSINESS			REFERRALS	
		Ref by	Jt. Ptnr.			Date	FYC / Comm.	Premium	GDC	**Trans. Type		Date	Amount	MDRT Credit	Number Obtained	Posted to Tracker
1.											Y / N					
2.											Y / N					
3.											Y / N					

**Recommendation/Referral Tracker**

Having an organized way to process recommendations through your system will make sure you stay on top the communication steps necessary to be effective. Use the Recommendation/Referral Tracker to establish and monitor your system.

RECOMMENDATION / REFERRAL TRACKER							
Referred By	Name of Referral	Phone	Contacted by Referrer (Y / N)	Letter or Card Sent	Date Called	Appt. Set (Y / N)	Referrer Updated (Y / N)
1.							
2.							
3.							
4.							

**Personal Productions Statistics Summary Report**

As a manager it becomes increasingly more difficult to keep track of your personal sales activities. Use the Personal Production Statistics Summary Report to enter your personal production information regarding activity and how it relates to client acquisition.

PERSONAL PRODUCTION STATISTICS SUMMARY REPORT FOR 2010							
	MANAGER				LOCAL OFFICE		
TYPE OF ACTIVITY	Discovery Interviews	Closing Interviews	Referrals	New Clients	Products Sold	PRODUCTION	Average Case Size
Annual Goal							
JAN							

***In Summary...***

Our company philosophy is “Activities Produce Results, and if you want to accomplish your goal of greater results, you need only improve the quality and quantity of your activities.” This is the Law of the Farmer, “We reap what we sow,” and it applies to every aspect of our life. The 555 Leadership Planner™ helps you to stay focused on those precise activities that you can control and that ultimately drive your business. Here is a summary of the four-step process we have described in this guide.

1. **FOCUS** on what you want and why
2. **PLAN** on how to get there
3. **EXECUTE** on the plan's high-payoff activities and
4. **MAINTAIN** the process and progress over time with regular reviews



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## Glossary of Terms

### *Business Planning Section*

**Basic Lifestyle:** This is the income you need to remain in your current life style. This assumes that you are current with all financial obligations and making on-time payments on any revolving debt. Think of this as the foundation level of your financial life.

**Preferred Lifestyle:** This level should start to get you excited, it provides you the income to start; eliminating any debt you may have; saving and investing programs for your future; upgrading your living environment; traveling to the places and participating in the endeavors that have been on your goals list for some time.

**Dream Lifestyle:** This is where you take the blinders off and drop any limiting beliefs you may have. If you could have it all, and you can, what would you ultimately want for yourself and those close to you. Don't get caught up in the "how" of achieving this lifestyle. Become clear of "why" you must have it for yourself. Once you become clear on the "why" the "how" will show up.

**Realistic Recruiting Ratio:** This is to separate fact from fiction and assure that you are performing at the activity levels needed to produce the results you are looking to achieve. It consists of the New Names that are needed in order to secure a 1st Interview and how many 1st Interviews it takes to ultimately hire one Producer.

**New Names:** The names or number of candidates (prospective producers) that are new in your pipeline. New names can be secured by either warm or cold sources.

**1st Interview:** This is your initial meeting with a candidate. No more than 30 minutes should be spent during the 1st Interview. The goal of the 1st Interview is to learn enough about the candidate to decide if you will administer any selection profile (test) your company requires.

**Tests Administered:** This represents that a test (profile) has been completed by the candidate. It includes any profile/test your company requires in the hiring process. It does not include licensing exams.

**Tests Passed:** This represents only the number of candidates that pass the Tests Administered.

**Pre Contract Associates:** This represents the number of candidates that have been offered and accepted pre contract status. They will now begin studies to secure the necessary licenses and move toward the contract or starter stage.

**Starter:** Indicates that a candidate is now on board as fully contracted Producer with your company. You are to be congratulated!

### *Activity Management Section*

**Recruiting Contacts:** Contacts made with candidates, via phone, for the purpose of setting a recruiting interviews.

**Warm source:** Warm sources require you to actively seek candidates through methods such as center of influence meetings, nominator referrals, or personal observation. Note: a Warm source candidate is usually not out looking for a new career. They are generally successful in their current endeavor.

**Cold source:** Cold sources are those that do not require your direct participation; e.g., newspaper advertising, direct mail and web job boards. Note: a cold source candidate is usually out looking for a job even though they may be currently employed.

**2nd Interview:** The number interviews with candidates that have passed your profile (test) and have come back for a second interview.



**Offer Interview:** The number of interviews with candidates in which a job offer is presented. Depending on your company's process, this could be for either pre-contract or contract status and anywhere from the 3rd to 5th interview.

**YTD:** The cumulative number of candidates you have placed in pre-contract status. This number includes those candidates that have failed to advance and are out of the system, as well as those candidates that have been offered (and accepted) full time status.

**Active:** The number of candidates that are still in the pre-contract phase of the hiring process.

**YTD Starters:** The number of actual contracted producers hired for the year.

**PEP/1-on-1's:** The number of weekly coaching sessions you hold with your producers using a set agenda; i.e., like the one provided in your planner.

**Phone Clinic:** The number of scheduled focused phoning sessions held where producers are making outbound prospecting calls. Also included during these sessions maybe instruction and demonstration on phoning skills.

**Solo Appointments:** The combined total number of appointments your producers have conducted on their own; i.e., with the benefit of a manager or mentor.

**Joint Sales Calls:** This is the combined number of sales interviews/appointments you ran with your producers for the week.

**Referrals Obtained:** The combined total number of referrals that your producers obtained as a unit.

#### **Leadership Hours**

**Recruiting:** Post your hours devoted to key recruiting activities.

**Development:** Post your hours devoted to unit development activities.

### ***Business Management Section***

**Prospective Candidates:** An individual that meets your selection criteria and has entered your pipeline.

**Source of Candidate:** Where the candidates name originated; e.g., Center of influence, Staff referral, Recruiting ad, etc....

**Tests Administered:** This refers to the number of tests given to candidates.

**C/S/Z:** City State Zip code

**Identifiable Natural Market:** This is to indicate, with a Yes or a No, whether the candidate has an identifiable natural market.

**Pre-Contracted Total:** Enter the total number of candidates you have placed into pre-contract status for the year.

**Pre-Contracted Loss:** The total number of candidates you have lost due to either fall out, or advancing in the process to become an active producer.

**Pre-Contracted Active (net):** The difference between Pre-Contract Total and Pre-Contract Loss. This gives you the current number of candidates you have in pre-contract status.

**Educational Sessions:** Enter by code the training that the producer has received that month.

**Code:** PK-product knowledge; T-Telephoning; FF-Fact Finding; OI- Opening Interview; CI-Closing Interview; CD-Case Development; M-Marketing; AFR-Asking for Referrals

## ScoreKeeping Guidelines

### DAILY:

1. **Keep Your Goals in the Forefront** – As you begin each day, and periodically throughout the day, scan your goals which are across the top of each calendar page, as well as the inspirational quotes. This helps keep motivation high, while resisting negativity and the seemingly endless distractions of the day.
2. **Focus on High-payoff Activities** – Do what you must first throughout the day. Seize the day...but with the week in mind. When you are at work, be at work, so that when you're home, you can be at home.
3. **Keep Score Daily** – Using the grids across the bottom, keep score and give yourself credit. Remember, “What gets measured tends to get done and improve.”
4. **Use your Schedule Wisely** – Stick to your Model Week for Recruiting Activities
5. **Before retiring, post and prioritize** – At the end of each day, tally your results in the daily grids and prioritize tomorrow's goals. Remember, your subconscious never sleeps and often you'll awaken with the answers and motivation you were searching for.
6. **Business Management** - Keep your Business Management section reports in the back of your Leadership Planner completed on a timely basis.

### WEEKLY:

1. **ScoreCard Results** – add up your daily scores and input the week's recruiting activity results into the eRecruitBoard program.
2. **Transfer to eScoreBoard** – (If applicable) Transfer your weekly results to eScoreBoard.
3. **Review Progress** – Review how you are doing against your goals. Remember the sage advice from the Kinder Brothers, "Measure and monitor what matters most."
4. **eRecruitBoard Weekly Report** – Be certain to schedule a weekly standard report to automatically be sent to your email inbox. It should also be set up as a Favorite on your Dashboard. This weekly report may then be reviewed with your Manager/Management Team in your weekly/monthly coaching meetings.

### MONTHLY:

Throughout the month, allow time to work on your business, not just in your business. By that we mean, you need to make time for activity and results management – an in-depth business assessment to analyze and strategize for improvement.

1. **Keep Score** – Update the Recruiting Activity Records in the back of the Planner as well as continue your weekly input in eRecruitBoard.
2. **Monthly eRecruitBoard Report** – Schedule a monthly standard eRecruitBoard Report to automatically be sent to your email inbox the first of each month. Be sure to add the monthly report to your Favorites on your Dashboard so that you may “drill down” from monthly to a weekly time frame if needed.

3. Recruiting and Retention Record – Monthly update the Retained to Date by Class, determine the rolling retention rate and the net gain or loss.
4. Recruiting Source Summary – Update your recruiting contacts for Annual Goal and Monthly/Quarterly numbers and indicating the total contacts for the month and quarter.
5. Unit Performance Record – Track the Commissions of the Associate Class by month.
6. Coaching Sessions - Prepare for the Weekly/Monthly Coaching Sessions with your Manager. Prepare your Planner and eRecruitBoard records. Take your Planner, Weekly or Monthly eRecruitBoard Report and a completed weekly/monthly agenda with you to your Coaching/Planning Session.
7. Complete Mileage & Expense Reports – No business achieves its full potential without good financial records. The mileage and expense form in the back of the Sales Activity Manager can help keep you profitable. (The master copy in the back is meant for copying. We recommend you affix receipts to each month's report and store them separately.)

#### **Miscellaneous Tips:**

- Candidate/Associate Profile – It is highly advisable to have an identified clear profile of your ideal associate candidate. This will assist you in your recruiting activities and interviews, especially when you are communicating to potential nominators the qualities and attributes you are looking for in candidates they refer to you. Determine specific characteristics and background for your ideal candidate, develop these in a written form and update on a regular basis as needed.
- Top 25 Draft Choices – Consider this list a “goldmine.” Maintaining contact with your most favorable prospective candidates is vital to your recruiting pipeline if they are not currently in a position to interview and begin your selection process. Consider some form of contact at least 4 times a year. This might include phone calls, in person meetings, and email/mail. Send the prospective candidate information about your agency, company and the industry several times during the year. Situations have a way of changing! When the prospective candidate is ready to make a move, you want them to think of you first!

## The Ten Commitments of Successful Leadership

*by Mickey Straub*

### I Commit To ...

1. Incremental, public goals with a deadline.
2. Personal and team accountability.
3. Maintaining consistent systems for consistent results.
4. High retention of employees and clients.
5. Providing an uplifting culture and to leading by example.
6. Sharing knowledge and wealth.
7. Helping others achieve their goals.
8. Open, honest and frequent communication.
9. Keeping score and maintaining accurate, retrievable performance records.
10. Continuous improvement, to never being totally satisfied and to climbing new hills.