

# 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

- Plan on how to get there by defining your business plan with specific action steps
- 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. <u>Maintain</u> the process and measure your progress over time through regular reviews with your manager or mentor.

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:

- 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.

Starter Goal (gross)		minus	"Attrition"	equals	Retained Appointments (net)
_		-		=	
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.

Warm Sources Center of Influence -Agent/Staff Referral - Current Customer - Personal Observation	Projected Starters from Source	Cold Sources College Recruiting - Job Fairs - Career Seminar - Internet Recruiting - Advertising - Outplacement Center	Projected Starters from Source
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. DET	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	STEP 4. CALCULATE APPLICABLE SKILL RATIOS (RRR - REALISTIC RECRUITING RATIOS)									
New Names to     1st Interviews     Offers to     Pre-Contracted     New Names       1st Interviews     to Offers     Pre-Contracted     to Starters     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 Joint Sales Joint Sales Sessions Calls 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**

<ul> <li>Drive</li> </ul>	<ul> <li>Dedication</li> </ul>	<ul> <li>Desire</li> </ul>	<ul> <li>Discipline</li> </ul>	Determination
---------------------------	--------------------------------	----------------------------	--------------------------------	---------------

Perseverance
 Winning attitude
 Respectability
 Loyalty
 Manageability

Honesty
 Professionalism
 Intelligence
 Acceptable appearance
 & mannerisms

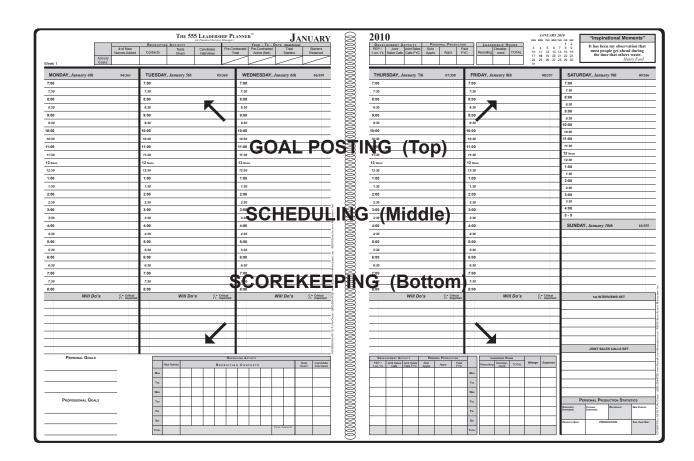
**Background** (Minimum Background Requirements)

- 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<sup>TM</sup>



#### 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

DEVEL	OPMENT A	CTIVITY	Perso	NAL PRODU	ICTION	LEADERSHIP HOURS			
PEP / 1-on-1's	Joint Sales Sales Calls Calls FYC			Apps.	Paid FYC	Recruiting	Develop- ment	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, log in and input your weekly numbers.

				RECRUIT	ring Act	FIVITY					
	New Names		Tests Given	Candidate Interviews							
Mon											
Tue											
WED											
Тни											
FRI											
SAT											
TOTAL				TOTAL C	ONTACTS						

Deve	OPMENT AC	TIVITY	Pers	ONAL PRODUC	CTION		LE	ADERSHIP HOL	JRS		
PEP / 1-on-1's	Joint Sales Calls	Joint Sales Calls FYC	Solo Appts	Apps.	Paid FYC		Recruiting	Develop- ment	TOTAL	Mileage	Expenses
						Мон					
						TUE					
						WED					
						Тни					
						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.



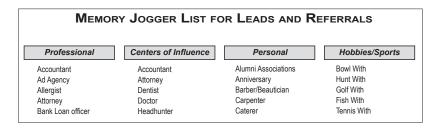
# Next Year's Annual Calendar

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.



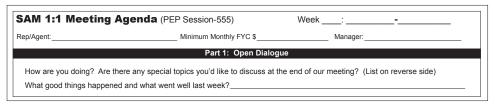
#### Memory Jogger List for Leads and Referrals

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



#### 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.



# **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.

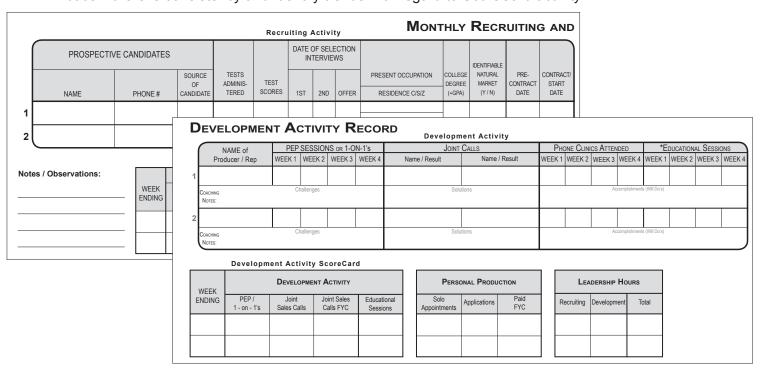
Top 25 Draft Choices											
NAME	PHONE	OCCUPATION	DATE OF LAST CONTACT	POTENTIAL CONTRACT DATE							

# 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.



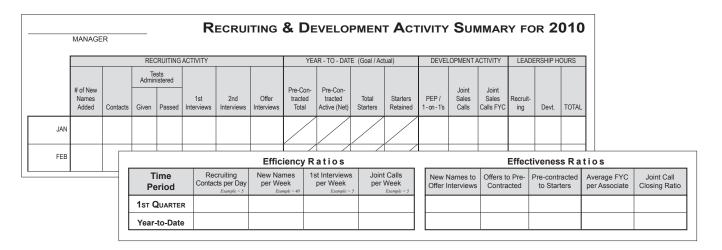
Page 10

## 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.

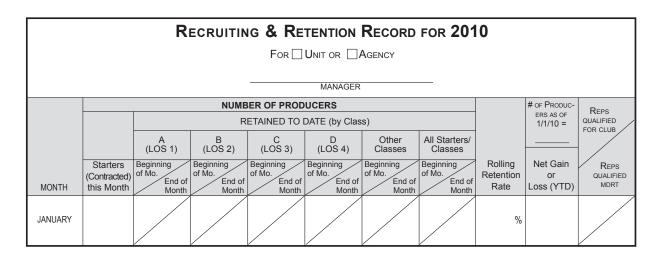


## The Recruiting & Retention Record

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%.

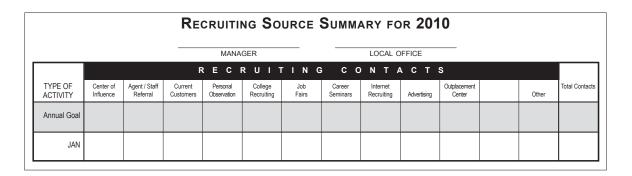


## **Recruiting Source Summary**

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?



#### **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											
	FIR	S T Y E	AR C	O M M I S	S I O N S	;						
MONTH	A CLASS	B CLASS	C CLASS	D CLASS	E CLASS	STD.	NDARD % 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 INITIALS Written					*Product(s)		SUBMITTED BUSINESS				With	P	PAID BUSINESS		REFERRALS	
	(Mo/Day)	CLIENT NAME Ref Jt. by Ptnr.	Source		Date	FYC / Comm.	Premium	GDC	**Trans. Type	Check	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												
		MA	NAGER	LC	OCAL 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 theses 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 priori tize 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 Leader ship 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."
- 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 candi
  dates 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 inter view 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.