



Getting Started with The Sales Activity Manager™

for Multi-Line Professionals

What gets measured tends to get done...and improve.

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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

Getting Started - Planner Review/Activity

As a result of your Sales Activity Manager review and completing this activity, you will:

- Become familiar with the basic functionality of your Planner
- Perform the 4 Basic Planner Skills:
 1. Complete Your Simple Business Plan
 2. Post Your Goals
 3. Keep Score Daily
 4. Weekly Totals
- Become familiar with the Sales Activity Manager Definition of Terms
- Review a Sample Model Week
- Review the Business Management section
- Review the Scorekeeping Guidelines

Instructions:

- The Activity Checklist below details a suggested process for learning to use your planner
- Use the Activity Checklist to track your progress as you complete each task

| Status | Task/Outcome | Where To Find It |
|--------|---|--|
| | Read: <ul style="list-style-type: none"> • Introduction • What is Sales Activity Management • Three Principles of SAM • <i>What's in it for me?</i> brochure Check status box and continue to the next task. | Sales Activity Manager Getting Started Guide <i>What's in it for me?</i> brochure |
| | Step 1 <i>Complete the Simple Business Plan</i> Check status box and continue to the next task. | Sales Activity Manager Getting Started Guide Sales Activity Manager |
| | Step 2 <i>Post Your Goals</i> Check status box and continue to the next task. | Sales Activity Manager Getting Started Guide Sales Activity Manager |
| | Step 3 <i>Keep Score Daily</i> Check status box and continue to the next task. | Sales Activity Manager Getting Started Guide Sales Activity Manager |
| | Step 4 <i>Weekly Totals</i> Check status box and continue to the next task. | Sales Activity Manager Getting Started Guide Sales Activity Manager |
| | Step 5 <i>Review the Sales Activity Manager Definition of Terms</i> Check status box and continue to the next task. | Sales Activity Manager Getting Started Guide |
| | Step 6 <i>Review the Sample Model Week</i> Check status box and continue to the next task. | Sales Activity Manager Getting Started Guide |
| | Step 7 <i>Review the Business Management Section</i> Check status box and continue to the next task. | Sales Activity Manager Getting Started Guide Sales Activity Manager |
| | Step 8 <i>Review the Scorekeeping Guidelines Section</i> Check status box. Refer often to the Getting Started Guide! | Sales Activity Manager Getting Started Guide |

Step 1 - Complete the Simple Business Plan

In order to be successful in any endeavor, you need a strong sense of purpose, clear direction and proper action steps. Goal setting helps you in all three categories. We describe them as: Why Goals, What Goals and How Goals. **THE SIMPLE PGA BUSINESS PLAN**, located in the front of your planner, will help you to clarify your “Why Goals”, or Purpose; with your Personal Mission; Business Vision and Guiding Principles; your “What Goals”; or Business Goals; by stating your Income and Professional Goals. Please confer with your Manager to develop your “How Goals”; or Action Plan by calculating your activity goals.

The sample sections that follow come from real producers that have completed the Simple Business Plan and are provided to give you ideas to consider. Keep in mind that your plan should reflect your personal feelings, what motivates you and your goals.



Refer to the front of your Sales Activity Manager™ (typically the second page) and follow the instructions to complete your Simple Business Plan.

I. Purpose

- ☐ Read the definition below and complete your Personal Mission in your planner.

PERSONAL MISSION

My personal mission is to truly make a difference in the world and to feel personally fulfilled by the work that I do.

Personal Mission

A Mission Statement is a clear statement that represents your true motivators for taking action. It goes beyond the superficial to the deep seated reasons why you want to become more successful and what will motivate you to do so. Very often it represents family, feelings and legacy. It inspires passion, and feeds the spirit...not the wallet. A personal mission statement is usually very personal and stated in a way that is non-measurable, non-numerical and inspirational. It may include phrases like: To be well thought of and respected; To be successful; To have a great image/reputation; To become a leader; To provide a wonderful environment and ideal lifestyle for my family to enjoy, To make a difference, To carefully balance the needs of my family and work, etc. It's your true reason to get out of bed in the morning.

Figure 1: Sample Personal Mission

- ☐ Read the definition below and complete your Business Vision in your planner.

BUSINESS VISION

My business vision is to build my practice with integrity to establish my reputation in the community. I will achieve MDRT level production by the end of the year.

Business Vision

A Business Vision Statement is a clear statement of what you want your business to look like in the future, i.e. 1-5 years. It can be stated in terms of size, reputation, prominence and/or production. Your business vision must be congruent with and help you accomplish your personal mission. Examples: To build a full-services practice with the finest reputation in the city; To qualify for MDRT, Top of the Table, and Court of the Table.

Figure 2: Sample Business Vision

- ☐ Read the definition below and complete your Guiding Principles in your planner.

GUIDING PRINCIPLES

My guiding principles are to conduct myself with honesty and integrity so that I will never feel personally compromised.

Guiding Principles

The emotional rules that govern your personal and business behavior make up your guiding principles and reflect your core values. They are the formal and informal ways that you conduct yourself, and the next step is to make sure that your behavior is consistent and congruent with your personal mission and business vision. Examples: Honesty, integrity, work ethic, kindness, mutual respect, punctuality, profitability, etc.

Figure 3: Sample Guiding Principles

II. Business Goals (Financial/Professional)

“What” Goals are your objectives for the year. Be specific, notice that the income goal gives you the opportunity to review your goals in 3 ways; Basic, Preferred and Dream Lifestyle. Consider these definitions:

Basic: meeting your basic income needs (versus your expenses).

Preferred: achieving your first level leaders club for your company or MDRT.

Dream: what would you achieve in your dreams? Top level leaders club; a new house, or dream car?

- ☐ **Complete** your income goals along with your Professional Goals; i.e., industry designation (e.g., CLU, ChFC, CFP), product specialty, etc...

| | | | |
|-----------------|-----------------|---------------------|-----------------|
| A. Income Goal: | \$ 35,000 | \$ 75,000 | \$ 100,000 |
| | Basic Lifestyle | Preferred Lifestyle | Dream Lifestyle |

B. What are my three primary professional goals this year? (Position, Designations/Awards, Skills, MDRT, etc.)

- Achieve my Dream Lifestyle income goal*
- Penetrate minimum of 3 target markets*
- Complete my first CLU course*

Figure 3: Sample Income and Professional Goals

Goals should have six qualities, represented by SAM-I-AM: Specific, Activated, Measurable - Incremental - Achievable, Motivational. Focus on the week, but treat each day like game day.

Step 2 - Post Your Goals

One of the greatest benefits of the Sales Activity Manager is the way it keeps your goals in front of you at all times, by having you print them in the Goal Boxes across the top of each week-at-a-glance page. Posting your goals each week helps to provide continuity (both consciously and subconsciously) with your business plan.

| <i>Goals for the Week:</i> | <i>X Dates</i> | <i>Reviews</i> | <i>Leads/ Referrals</i> | <i>Prospect Contacts</i> | <i>Appts Set</i> | <i>Appts Kept</i> |
|----------------------------|----------------|----------------|-------------------------|--------------------------|------------------|-------------------|
| | | | | | | |

| <i>Fact Finders</i> | <i>Cases Open</i> | <i>Ask To Buys</i> | <i>Buying Entities</i> | <i>New Clients</i> | <i>SALES COUNT</i> |
|---------------------|-------------------|--------------------|------------------------|--------------------|--------------------|
| | | | | | |

Step 3 - Keep Score Daily

You may not be able to control your results, but you can influence them by controlling your activities. Giving yourself credit by recognizing your accomplishments helps balance out the emotional roller-coaster often associated with your sales/planning cycle.

The grids across the bottom of the week-at-a-glance calendar pages make it easy to keep score daily by providing you with boxes to capture your activity as you perform them throughout the day.

| | <i>X Dates</i> | <i>Reviews</i> | <i>Leads/ Referrals</i> | <i>Prospect Contacts</i> | <i>Appts Set</i> | <i>Appts Kept</i> |
|-----------|----------------|----------------|-------------------------|--------------------------|------------------|-------------------|
| MONDAY | | | | | | |
| TUESDAY | | | | | | |
| WEDNESDAY | | | | | | |
| THURSDAY | | | | | | |
| FRIDAY | | | | | | |
| SATURDAY | | | | | | |
| TOTALS | | | | | | |

| <i>Fact Finders</i> | <i>Cases Open</i> | <i>Ask To Buys</i> | <i>Buying Entities</i> | <i>New Clients</i> | <i>SALES COUNT</i> | | |
|---------------------|-------------------|--------------------|------------------------|--------------------|--------------------|------------|-----|
| | | | | | <i>Day</i> | <i>WTD</i> | |
| | | | | | | | M |
| | | | | | | | T |
| | | | | | | | W |
| | | | | | | | TH |
| | | | | | | | F |
| | | | | | | | S |
| | | | | | | | TOT |

Step 4 - Weekly Totals

At the end of the week, you'll want to tally up your daily activities in the "totals" line on the grid across the bottom of the calendar pages as well as the "total" line on the grid on the lower right calendar page. Transfer these weekly totals to the appropriate Quarterly Scorecard in the back of the planner.

| | X Dates | Reviews | Leads/ Referrals | Prospect Contacts | Appts Set | Appts Kept | Fact Finders | Cases Open | Ask To Buys | Buying Entities | New Clients | SALES COUNT | | |
|-----------|---------|---------|---------------------|----------------------|--------------|---------------|-----------------|---------------|----------------|--------------------|----------------|-------------|-----|-----|
| | | | | | | | | | | | | Day | WTD | |
| MONDAY | | | | | | | | | | | | | | M |
| TUESDAY | | | | | | | | | | | | | | T |
| WEDNESDAY | | | | | | | | | | | | | | W |
| THURSDAY | | | | | | | | | | | | | | TH |
| FRIDAY | | | | | | | | | | | | | | F |
| SATURDAY | | | | | | | | | | | | | | S |
| TOTALS | | | | | | | | | | | | | | TOT |

QUARTERLY SCORECARD - 1st Quarter

| | X Dates | Reviews | Leads/ Referrals | Prospect Contacts | Appts Set | Appts Kept | Fact Finders | Cases Open | Ask To Buys | Buying Entities | New Clients | SALES COUNT |
|----------------------------|------------|---------|---------------------|----------------------|--------------|---------------|-----------------|---------------|----------------|--------------------|----------------|----------------|
| WEEKLY GOALS | | | | | | | | | | | | |
| <small>Days Worked</small> | | | | | | | | | | | | |
| Week 1 | | | | | | | | | | | | |
| Week 2 | | | | | | | | | | | | |
| Week 3 | | | | | | | | | | | | |
| Week 4 | | | | | | | | | | | | |
| Week 5 | | | | | | | | | | | | |
| January ACTUAL | | | | | | | | | | | | |
| January GOALS | | | | | | | | | | | | |
| % of Goal Achieved | | | | | | | | | | | | |
| Week 1 | | | | | | | | | | | | |
| Week 2 | | | | | | | | | | | | |
| Week 3 | | | | | | | | | | | | |
| Week 4 | | | | | | | | | | | | |
| Week 5 | | | | | | | | | | | | |
| February ACTUAL | | | | | | | | | | | | |
| February GOALS | | | | | | | | | | | | |
| % of Goal Achieved | | | | | | | | | | | | |
| Week 1 | | | | | | | | | | | | |
| Week 2 | | | | | | | | | | | | |
| Week 3 | | | | | | | | | | | | |
| Week 4 | | | | | | | | | | | | |
| Week 5 | | | | | | | | | | | | |
| March ACTUAL | | | | | | | | | | | | |
| March GOALS | | | | | | | | | | | | |
| % of Goal Achieved | | | | | | | | | | | | |
| 1st QTR TOTALS | | | | | | | | | | | | |

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Note to eScoreBoard Users: After you have tallied your weekly numbers, go to www.eScoreBoard.com, log in and input your weekly numbers.

Activity Category Definitions

Category Definitions

| | |
|--------------------------|---|
| Days Worked | The number of days you worked. Fractional days (i.e. 0.5) are accepted. |
| X Dates | The number of policies that have an expiration date on this day/week. |
| Reviews | Meeting with a current client to determine if their coverage is adequate for their present needs. |
| Leads / Referrals | A person or business entity that meets your or your company's requirements to be a solid lead or referral. |
| Prospect Contacts | Actual contacts with people who have the authority to book an appointment with you. These are usually via phone, but may also be in person. |
| Appts Set | The number of appointments set or booked as a result of your contacts. |
| Appts Kept | The total number of appointments that are kept each day/week. |
| Fact Finders | The total number of New Fact-Finding interviews. These only include new, initial Fact-Finding interviews, not interviews where facts are updated on existing prospects or clients. This is sometimes referred to as an initial "Needs Assessment", "Discovery Interview", or "Confidential Information gathering appointment". Any company approved Fact Finding form or process may be used. |
| Cases Open | Refers to a person or business entity whom you have enough information about that, in your opinion, has a strong interest in doing business with you, and someone with whom you most likely have a future appointment scheduled. This can refer to either business with a new prospect, or repeat business with an existing client. |
| Ask To Buys | Any meeting or interview in which you ask a prospect or client for their business. It most commonly refers to asking for money, but may also refer to a request for their signature or approval for anything that advances the sale toward a successful conclusion. You are asking the prospect or client to take an action which is required for the finalization of the sale. |
| Buying Entities | The number of households, families, pocket books or organizations that purchase your product or service. Since you may sell multiple insurance products or other financial instruments to one entity, this is a vital number to track and the only way in which you can accurately track your "closing ratio." |
| New Clients | This is the number of premium or commission payers (individuals/entities) upon whom you have submitted business who are new to your practice for either core life or other financial products. (Existing clients who make repeat purchases are not included.) This is a measure of client-base growth. |
| Sales Count | A points system that is based on the amount of premium and additional endorsements added to a policy or policy holder. |

| | |
|-------------------------|--|
| Life | This is the number of submitted life insurance units. |
| H/DI/LTC | This is the number of submitted health, disability and long-term care sales units. |
| Annuity | This is the number of annuity sales units. |
| Mutual Funds | This is the number of mutual fund sales units. |
| Auto | This is the number of auto sales units. |
| Home | This is the number of home sales units. |
| Umbrella | This is the number of umbrella sales units. |
| Other | This is the number of other sales units. |
| Life (\$) | The amount of commissions you submitted for life products. |
| H/DI/LTC (\$) | The amount of commissions you submitted for health, disability and/or long-term care products. |
| Annuity (\$) | The amount of commissions you submitted for annuities. |
| Mutual Fund (\$) | The amount of commissions you submitted for Mutual Funds. |
| Auto (\$) | The amount of commissions you submitted for automobile products. |
| Home (\$) | The amount of commissions you submitted for home products. |
| Umbrella (\$) | The amount of commissions you submitted for umbrella products. |
| Other (\$) | The amount of commissions you submitted for other business. |
| Total (\$) | The total commission you submitted. |

Develop a Model Week

Time management is an essential part of building your practice and using a model work week helps to keep you focused on your high pay-off sales activities. Utilize the model week provided to you by your manager and/or refer to the sample that follows. The key is to create model week for yourself that matches your practice and market. While there is no doubt that you need to “seize the day”, you must do so with the “week” in mind and “seize the week” with as much enthusiasm.

While keeping in mind your key tasks, identify them appropriately on your calendar pages, and transfer those activities that you deem necessary to the monthly calendar pages. Using your week-at-a-glance calendar pages, block out productivity time, administrative time, self-development time, personal time, etc., from Monday through Saturday, to the best of your ability.

| | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY | |
|-------|--|--|--|---|--|---|-------------|
| | Exercise (Recommended) | Personal Time | Exercise (Recommended) | Personal Time | Exercise (Recommended) | Personal Time | |
| 7:00 | Organizational/ Team Meeting | Mail & E-Mail | Mail & E-Mail | Mail & E-Mail | Mail & E-Mail | | |
| 7:30 | | Role Play: Phone Scripts | Review Marketing Plan | Review Referral Scripts | Administrative/ Clean-up Time | | |
| 8:00 | | | | | | | |
| 8:30 | | | | | | Phone Clinic Kick Off | |
| 9:00 | CLASSROOM TRAINING: Fact Finders Key Money Concerns Drill for Skill Getting Referrals Closing Interviews | Phone Clinic and/or Prospecting Time | Classroom Training: Case Analysis | Role Play: Phone Scripts Referral Scripts | Prospecting/ Marketing/ Early Appointments | Appointment (Optional) | |
| 9:30 | | | | | | | |
| 10:00 | | | | | | | |
| 10:30 | | | | | | | |
| 11:00 | | | Administrative/ Clean-up Time | Prospecting/ Marketing | Prospecting/ Marketing/ Early Appointments | Phone Clinic and/or Prospecting Time | |
| 11:30 | | | | | | | |
| 12:00 | | | | | Prospecting/ Marketing | | |
| 12:30 | | | | | | | |
| 1:00 | Lunch and Learn | Lunch and Learn | Lunch and Learn | Lunch and Learn | Lunch and Learn | Personal Time | |
| 1:30 | | | | | | | |
| 2:00 | Return Calls | Return Calls | Return Calls | Return Calls | Return Calls | | |
| 2:30 | Individual 1-on-1's: (PEP/GOALS Activity Review) | Prospecting/ Marketing | Prospecting/ Marketing/ Early Appointments | Prospecting/ Marketing | Team Meeting: Weekly Activity Planning | | |
| 3:00 | | | | | | | |
| 3:30 | | | | | | | |
| 4:00 | Prospecting/ Marketing | | | Personal Time | Case Review with Manager | | |
| 4:30 | | | | | | | |
| 5:00 | | SUNDAY | | | | | |
| 5:30 | Appointment | Phone Clinic Kick Off | Appointment | Appointment | Phone Clinic Kick Off | Personal Time | |
| 6:00 | | Phone Clinic 50-100 Dials (Record Data in SAM Book) | | | Appointment | | Appointment |
| 6:30 | | | | | | | |
| 7:00 | Appointment | | Appointment | Appointment | | | |
| 7:30 | | | | | | | |
| 8:00 | | | | | | | |
| 8:30 | Appointment | Personal Time | Appointment | Appointment | Personal Time | | |
| 9:00 | | | | | | | |

Types of Appointments: Fact Finders, Closing, Strategy, Service, etc.

Business Management

The final step is to maintain your business plan over time to ensure success. Be sure to involve your manager to receive the proper coaching and support. This objective opinion is critical to achieving your goals.

The Sales Activity Manager contains the monthly/quarterly/annual practice management pages you need to manage your business:

- Qualified Prospect Evaluator
- Business Record
- Quarterly/Annual Scorecards
- Client Pending/Case Open List
- Recommendation/Referral Tracker
- Expense Record

These pages are self explanatory in nature and follow the client building and sales activity management process. We hope that you find these tools an effective way to manage your business.

QUALIFIED PROSPECT EVALUATOR

Name: _____

| NAME | Face or Phone | Source | Marital | Occupation | Depen- | Birth Dates | Life Insurance Owned? | Easily Seen? | Appt | Follow-up | Referred to Open List |
|------|---------------|--------|---------|------------|--------|-------------|-----------------------|--------------|------|-----------|-----------------------|
| 1 | | | | | | | | | | | |
| 2 | | | | | | | | | | | |
| 3 | | | | | | | | | | | |
| 4 | | | | | | | | | | | |
| 5 | | | | | | | | | | | |

CLIENT PENDING / CASE OPEN LIST

Name: _____

| | Date Case Opened | Qualified Prospect | PROSPECT / CLIENT | Referrer | Jt. Partner | Phone | Forecast (FYC / Prem) | Comments | Closing Interview Scheduled | IMPORTANT DATES | | | | Transferred to Business Record |
|---|------------------|--------------------|-------------------|----------|-------------|-------|-----------------------|----------|-----------------------------|-----------------|---------|-----------|--------|--------------------------------|
| | | | | | | | | | | Fact Finder | Written | Submitted | Issued | |
| 1 | | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | |

BUSINESS RECORD

Time Period: _____

| Date Written (Mo/Day) | CLIENT NAME | INITIALS | Ref by | Jt. Partner | Source | *Product(s) Sold | SUBMITTED BUSINESS | | | | With Check | PAID BUSINESS | | REFERRALS | |
|-----------------------|-------------|----------|--------|-------------|--------|------------------|--------------------|-------|---------|-----|------------|---------------|------|-----------|------|
| | | | | | | | Date | FYC / | Premium | CCC | | **Trans. | Date | Amount | MDRT |
| 1. | | | | | | | | | | | | | | | |
| 2. | | | | | | | | | | | | | | | |
| 3. | | | | | | | | | | | | | | | |
| 4. | | | | | | | | | | | | | | | |

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. | | | | | | | | |

QUARTERLY SCORECARD - 1st Quarter

| | X Dates | Reviews | Leads/ Referrals | Prospect Contacts | Appts Set | Appts Kept | Fact Finders | Cases Open | Ask To Buys | Buying Entities | New Clients | SALES COUNT |
|--------------|---------|---------|------------------|-------------------|-----------|------------|--------------|------------|-------------|-----------------|-------------|-------------|
| WEEKLY GOALS | | | | | | | | | | | | |
| Week 1 | | | | | | | | | | | | |
| Week 2 | | | | | | | | | | | | |
| Week 3 | | | | | | | | | | | | |

ANNUAL SUMMARY SCORECARD

| Reporting Period | X Dates | Reviews | Leads/ Referrals | Prospect Contacts | Appts Set | Appts Kept | Fact Finders | Cases Open | Ask To Buys | Buying Entities | New Clients | SALES COUNT |
|------------------|---------|---------|------------------|-------------------|-----------|------------|--------------|------------|-------------|-----------------|-------------|-------------|
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

MILEAGE RECORD

| Day | Start | Stop | Miles / KM |
|-----|-------|------|------------|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |

EXPENSE RECORD

| Day | Auto | Transportation | Lodging | Meals/ Enter. | Promotion | Misc. + Description | Totals |
|-----|------|----------------|---------|---------------|-----------|---------------------|--------|
| 1 | | | | | | | |
| 2 | | | | | | | |
| 3 | | | | | | | |
| 4 | | | | | | | |

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 – Respect your time by wasting as little as possible and stick to your Model Week.
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. Keep your Qualified Prospect Evaluator, Case Open List, Business Records & Recommendation/Referral Tracker current – This should be done each day, throughout the day.

WEEKLY:

1. ScoreBoard Results – Add up your daily scores and write them in the total columns at the bottom and to the right of the scorekeeping grids.
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. PEP/One-on-one Coaching – Meet with your manager/coach and ask them to help you refine your skills. Be sure to bring your planner and (if applicable) your eScoreBoard reports to your coaching session.

MONTHLY:

Throughout the month, you need to work in your business, as well as on it. By that we mean, you need to perform the necessary activities, but you also need to collect information along the way so that you can analyze and strategize on ways to get better.

1. Keep Score – (If applicable) Update eScoreBoard weekly (or daily) so you can review your results monthly and other frequencies.
2. Review Last Month's Goal vs. Actual Performance – Stop and reflect on the last month. What's going well? What are your opportunities for improvement? What kinds of things can you do to improve?
3. Update Recommendations/Referrals & Case Open Lists – Record or check the status of all prospects and open cases. This becomes your "Hot List" of cases to be developed or closed during the upcoming month, which will initiate your contact call list. Record these in the daily "Will Do's" sections

of the upcoming month. (We recommend that you use a computerized system, i.e., ACT, Goldmine, CDS, Microsoft Outlook, etc., for computerized contact management system.)

4. Update Business Record – Using the section in the back, post all business submitted, issued and paid throughout the month, as well as business-in-transfer. Be sure to track MDRT credits
5. Prepare for PEP/One-on-one Coaching and Sales Team Meeting – Bring your planner and (if applicable) your eScoreBoard reports to review your results in detail with your manager.
6. Review Recommendation/Referral Tracker & Referral Scripts – Recommendations/Referrals and personal introductions are the life blood of a successful financial services practice. Review your existing list (inventory) of referrals. Check the quantity and quality of your existing referrals. Determine how many of these you will call each day and record this goal in the “Will Do’s” sections. This is also the time to review your list of names that you are going to suggest to prospects and clients to help prompt their referral efforts. An example might be a roster of Associates in a law firm or a list of company officers. This is also an excellent time to review your referral language. Are you comfortable with the content? Have you mastered it?
7. Quarterly Scorecard – Enter each week’s activities for the appropriate week and quarter. It is important to maintain the weekly, monthly and then quarterly totals for your quarterly success results.
8. 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.)

QUARTERLY:

1. Total the activities for each month of the quarter to secure each quarter’s totals. The monthly and quarterly totals may then be inserted in the Annual Summary Scorecard.
2. Goals vs. Actual Performance – Review your goals to your activities for the quarter as well as year-to-date for your performance improvement. Remember, success in this business is taking the time to manage and improve your performance. You should see the results of identifying your high payoff sales activities and see increases in their dollar value average.

ANNUALLY:

1. Complete the Annual Summary Scorecard for the current year.
2. Spend time reviewing your current year results on where you are and where you need to improve. Annual goal and business planning is a critical component of business management. Don’t leave success to chance...succeed on purpose!

Miscellaneous Tips:

- Review Quality of Prospects – It is highly advisable to have an identified clear profile of both your ideal client and the minimum standards required to qualify as a new client in your practice. Review these two profiles and see if the quantity and quality of your prospects measure up.
- Review Centers of Influence & Strategic Alliance Lists – One way of upgrading your clientele is to systematically work on developing Centers of Influence (C.O.I.) who can refer you “up” to markets with greater potential. These are often Attorneys, Accountants, Trust Officers or influential business people. Review the quantity and quality of your list. Your Monthly Work Plan should include further identification and contact. Use your “Will Do’s” sections to prompt your contact.

P R O M I S E

Seven Top Reasons to be in the Financial Services Industry

Population

The U.S. population is living longer and growing at the rate of 2.5 million per year.

Retention

The industry values retention and provides supportive tools and systems.

Opportunity

The opportunity to accumulate wealth and help others is abundant.

Mentoring

Our industry is built on mentoring and helping each other succeed.

Insurance

The “I” word is back in vogue and more important than ever.

Stability

Financial services products are needed during all economic times.

Entrepreneurship

The entrepreneurial spirit and freedom to be your own boss is alive and well.