

Making a Business Plan for 2009!

**Attached are “Business Monthly Control Sheets” with Instructions.
This will help you meet your Goal!**

Call: Marty Shanton at 800-288-6170

“For Help Finding Markets To Sell In These Times Of Turmoil”



Making a business plan is the easiest way to maximize your time and energy in sales. In order to grow your premium from the year before, it is very important to have a plan. It's no wonder many agents reach a plateau in sales they just can't seem to break. Maybe for you it's \$50,000 or it might be \$150,000. Either way, to continue growing your business, it is critical to have a game plan. Once you have a plan, you can focus your energy into executing your plan, instead of wasting energy worrying about how to grow your business.

STEP 1 - Set a GOAL

Setting a goal for your new year is the first and easiest step. Determine an achievable amount of premium you would like to write for the year. An easy way to do this is to look back at what you wrote last year, and determine what would be a reasonable increase. It may be 10% or even 30%. The important thing is to challenge yourself to increase sales.

STEP 2 - Break It Down

Once you have set a goal, you must break it down to manageable chunks. For example, let's say your goal is \$100,000 in paid premium. \$100,000 can be broken down to \$8333 per month and \$1923 per week. Convert your desired premium into number of sales. If your average sale is \$650, then you need to pay for 3 cases per week. Remember, it's not a perfect world; therefore, you must take into consideration declines, not taken, etc. Let's figure that 4 applications will turn into 3 paid sales. What is your appointment-to-sales ratio? If you can sell 4 applications for every 7 appointments, then you must have 7 appointments per week.



STEP 3 - Make a Plan

Now that you've broken it down, you know exactly how many appointments you need in order to reach your goal. In the example above, you would make a plan to always have 7 appointments a week. Maybe this means more cold-calling, more mailings, or canvassing local small businesses. Maybe it means a few more hours of prospecting per week. Either way, you need to plan out your time to reach the 7 appointments.

STEP 4 - Implement Your Plan

All the planning in the world means nothing unless you are willing to carry it out. Put yourself on a schedule and **DO NOT DEVIATE**. Remember, every failure has an excuse, but success has no excuses.

STEP 5 - Review Your Progress

Reviewing your progress is crucial to achieving your goal. If you are not on track one month, you then need to work harder the following month. If you are ahead one month, don't use that as an excuse to slack the following month.

**DON'T GET DISCOURAGED. YOU WILL SUCCEED
IF YOU STAY ON TRACK!**

Did You Know?



Did You Know...

“Success is a habit.” A coach may have told you this in the past. Those words are true for winners in sales, too. Create a habit for success by using a simple method for tracking your effort. Tracking your progress each week or each month will remind you of your goal and give you a feeling of accomplishment along the way. To keep yourself on track, set up a simple system for tracking your progress when you make your plan for the year.

Whether you track your progress on a PC or on paper, this habit will put you on the path to success.



BUSINESS CONTROL SHEET INSTRUCTIONS

Activity Calendar

- Complete the month, year and dates.
- Establish your daily Preparation (P), Telephoning (T) and Seeing People (S) blocks of time. Do not vary your daily blocks of time. Record your schedule in the adjacent time block.
- You can hold a breakfast appointment at 7:30 a.m. and up to two lunch appointments each day, for example, at 11:30 a.m. and 12:30 or 1:00 p.m. (Eat light!)
- Evening appointments can be scheduled as needed.
- During your Telephoning block of time, you will need to dial _____ numbers in order to contact _____ people and set _____ appointments. Telephoning may be stopped as soon as you set _____ appointments.
- Record your results in your Telephoning block of time like this:

A.M.

P.M.



- Since appointments will cancel or postpone, do not worry about overbooking. Confirm appointments with "I'm running just a bit late, but will be there as close to _____ as possible." Reschedule appointments as necessary.

Work Flow, Activity, Results and Points

I. Work Flow

Qualified Suspects:

- Qualified suspects are those people (1) who you know, or (2) who know you, or (3) who are known by someone you know.
- Record all Qualified Suspect names and business telephone numbers as referred/identified, including the date. New agents can use the Clients section to record additional Qualified Suspects, or additional pages can be printed.
- Record all callbacks to be made during the month, including the date for recontact.

Clients:

- Record all birthday contacts and six month contacts to be made during the month.

BUSINESS CONTROL SHEET

Month _____

Year 20_____

PAID CASES				
	LIFE	DI	ANNUITY	OTHER
ANNUAL GOAL	_____	_____	_____	_____
YEAR-TO-DATE	_____	_____	_____	_____
DIFFERENCE	_____	_____	_____	_____
CURRENT MONTH	_____	_____	_____	_____

MDRT CREDIT	
ANNUAL GOAL	_____
YEAR-TO-DATE	_____
DIFFERENCE	_____

Name _____

Telephone _____

(please call if found)

IV. POINTS

DATE	ACTIVITY				POINTS					
	() DIALS	() CONTACTS	() APPTS. MAD E	() APPTS. K EPT	(1/2) R E F F E R R E D L E A D S	(1) A P P R O A C H I N T E R V I E W S	(1) C L I E N T I N T E R V I E W S B L D G.	(1) O P E N I N G I N T E R V I E W S	(1) C L O S I N G I N T E R V I E W S	() P O I N T S
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31										
TOTALS										

Business Control Sheet for: Month _____ Year 20____

ACTIVITY CALENDAR

Month _____ Year 20_____

TIME	MONDAY ()	TUESDAY ()	WEDNESDAY ()	THURSDAY ()	FRIDAY ()	SATURDAY ()	TIME
7:30							7:30
9:00							9:00
10:00							10:00
11:00							11:00
12:00							12:00
1:00							1:00
2:00							2:00
3:00							3:00
4:00							4:00
TIME	MONDAY ()	TUESDAY ()	WEDNESDAY ()	THURSDAY ()	FRIDAY ()	SATURDAY ()	TIME
7:30							7:30
9:00							9:00
10:00							10:00
11:00							11:00
12:00							12:00
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2:00							2:00
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