

## Activities & Results Tracking

**Date:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Week #** \_\_\_\_\_

Activities	This Week		Year to Date	
	Goal	Actual	Goal	Actual
<b><u>Direct Solicitation</u></b>				
1. Meet clients to ask for introductions using your Ideal Client Profile				
2. Meet centers to ask for introductions using your Ideal Client Profile				
3. Send topic-specific direct mail letter (Monday) and follow up by telephone Weds/Thurs/Friday to ask for opportunity to meet and discuss the topic				
4. Send article or bulletin on specific topic (e.g., Due Care) to targeted attorney or accountant; call and ask for opportunity to discuss in person				
<b><u>General Prospecting</u></b>				
1. Conduct Planned Periodic Reviews with clients due for review				
2. Add prospects to your development list based on personal observation or general referrals (not introductions)				
<b><u>Marketing</u></b>				
1. Conduct market surveys in your primary target market				
2. Conduct or participate in agency seminar <i>How Money Really Works</i>				
<b><u>Results</u></b>				
• Obtain personal introductions from clients and centers				
• Obtain personal introductions/cases to work on from non-insurance professional advisors				
• Complete Planned Periodic Review factfinders with clients				
• New Face 1st Interviews				
• New Face Factfinders, completed				
• Recommendations Presented				

## Activities & Results Tracking

**Date:**

• Cases Sold				
• Life Policies Sold				
• Life Annualized FYC				
• DI Policies Sold				
• DI Annualized FYC				
• Investment Sales				
• Investment FYC				

To use this type tracking system requires the agent and management to agree to specific activity levels for each individual agent based on the agent's target audience (type of market, anticipated case size, complexity of the situation, etcetera) and the agency's standards for sustained activity levels. The above samples would relate to a relatively new agent going after typical Individuals and Families with Capital Needs, in a coordinated effort lead by the agency.

To these activities you could add certain market-specific activities as the agent penetrates target markets; add markets; raise or lower activity levels as casework rises and falls, etcetera. By tracking weekly activities and the *year to date* results, seeing trends develop before they become problems is easy. The *year to date* goal is the weekly goal for any item multiplied times the number work week it is for the agent.

Example: The agent is in the tenth week of the year, so the YTD goal for the activity of asking clients for introductions using the Ideal Client Profile is 10 (10 weeks of asking one client per week), and the YTD goal for the result is 15 (10 weeks of 1.5 introductions actually made on the average each week). If the agent has done 10 requests but has only 10 introductions made, the activity is at a good level but the quality must be checked. *Is s/he asking for introductions properly, using the Ideal Client Profile? Is s/he allowing things to fall through after the meeting by not following up with the client to make the introductions happen? Is s/he asking the right people?* On the other hand, if the activity level is low but the results correlate to that activity level (at roughly 1.5 introductions consummated after each request), then you know that the activity level needs a boost. By watching trends as they unfold, agents and managers can see trouble and avoid it before it becomes problematic.

For other types of activities that are more event oriented and less under the direct personal control of the agent, such as workshops conducted by the agency or attending association meetings to meet people in a target market, a scheduling calendar works best. You will have to decide for yourself what items belong on the calendar and which belong of the Activities and Results Tracking form.