

Behaviors and Tools

BEHAVIORS

- Develop your Personal Business Plan
- Execute the trade down.
- Lead your High Performance Team.
- Issues/Risk Fact Sheet or development and studying
- Developing your business acumen
- Comfort around emerging risk and issues
- Proactive management of relationships (Prospects, clients, COIN's, team).
- Pipeline development.
- Proactive Retention.
- Attitude
- Dress
- Expanding your Network
- Make Calls
- Effective Presentation Skills
- Prewrite and prep on Prospects
- Client Retention Relationships
- Generating and asking for Referrals.
- Asking quality questions.
- Be Effective in Sales System. Being conversational and comfortable with the following:
 - Describing the sales process
 - The Risk Opportunity
 - Insurance and stuff vs the Risk Opportunity
 - Entire assessment
 - Final Plan presentation
 - Continuation meetings
- Discovery of your Unique Abilities and working inside of those unique talents 80% of the time.
- Producer Time Management and Productivity
- Target and Minimum account size.
- Filling out Target Account Strategy Plans.
- Low Risk Practice.
- Profile your accounts.
- Know your value added services and the value brought to the client.
- Practice Listening Skills