

# INCITE.

Producer Mid Year Update

# PRODUCER MID-YEAR CHECK UP

2017 Revenue Goal	\$125,000
YTD	\$42,000
Remaining Balance	\$83,000
Average Account Size	\$8,500
Closing Rate	65%
Conversion Rate	45%
Sales Remaining	10
Proposals needed	15
First Appointments Needed	33
Current Monetized Pipeline	\$115,000
Additional Pipeline Needed	$\$280,000 - \$115,000 = \$165,000$



# STRATEGIES AND TACTICS

## Strategies

Cold Calls	15 First Appointments
Networking with employees of prospects	5 First Appointments
Association Involvement	7
Center of Influence Meetings	6

## Tactics:

Make 15 cold call contacts per week	1 new appointment per week
Networking with employees of prospects	2 meetings per month 1-2 first appointments per month
Association Involvement	2 meetings per month and 2 first appointments per month
Center of influence meetings	2 per month and 1-2 first appointments per month