|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1 **☐** | 2 **☐** | 3 **☐** | 4 **☐** | 5 **☐** |
| Contact all clients and check in. Help them get set up for video where possible. Discuss telemedicine. Ask about at risk employees. | Refine prospecting list and rebuild where necessary. Study 2 to 3 niches to understand what they will deal with in next 12 months. | Create a target strategy for niches.  Search for articles showing what great companies are doing to manage the current situation. | Brand and share Zywave info or something else and share with clients, prospects and network.  Find one area of abundance to focus on. | Send out a Business Continuity Plan around corona virus to all clients and prospects. |
| Find 2 articles that allow you to educate your clients, prospects and network  Read book for 20 minutes | Identify the 3 to 5 most challenging insurance issues companies are dealing with in this environment. Work with your team to build out educational piece.  Read book for 20 minutes | Read Zywave’s Covid 19 Resource Center and pull one useful piece for clients, prospects and network. <https://www.zywave.com/covid-19-resource-center/>  Read book for 20 minutes | Begin to put together a list of emerging risks from COVID 19. Connect with your team via video and discuss challenges and how employers can address.  Read book for 20 minutes | Check in with your account managers via video  Use LinkedIn direct message, text and phone  Read book for 20 minutes |
| 6 **☐** | 7 **☐** | 8 **☐** | 9 **☐** | 10 **☐** |
| Continue to reach out to prospects via phone, email, text and LinkedIn Direct Message. | Contact Niche Associations and offer to help provide content. Compliance, insurance information, etc. | Contact Local Chambers, Rotary’s and other Networks and ask share content. | Identify a value piece on employee communication in a virtual world. Send to your clients, prospects and network. | Contact any prospects you weren’t able to touch and ask for video call to see how they are doing and what you can do to help. |
| Find a great article to share with clients and prospects and send. Financial wellness for employees.  Read for 20 minutes | Where can you build confidence today? Spend 15 minutes doing it.  Read book for 20 minutes | Build a White Paper with emerging risks and how to respond. Brand and send to clients, prospects and network  Read book for 20 minutes | Read book for 20 minutes | Use LinkedIn direct message, text and phone  Read book for 20 minutes |
| 11 **☐** | 12 **☐** | 13 **☐** | 14 **☐** | 15 **☐** |
| Work with your team to create a list of your vendors and connections that are valuable at a time like this. | Collaborate with your team to discuss how the environment is evolving and search for articles that show that evolution and response. | Reach out to clients and prospects and ask them who they need to be connected to right now. Find ways to make connections. | Identify new information and provide to everyone you can. Testing sites, restaurants serving take out.. | Touch base with the Chamber and other community organizations as well as Associations. Share article or value piece |
| Read for 20 Minutes | Read for 20 Minutes | Where can you build confidence today? Spend 15 minutes doing it.  Read for 20 Minutes | Take a step back and identify 5 things to be thankful for. Thank someone  Read for 20 Minutes | Check in on your Account Managers via video.  Read for 20 Minutes |
| 16 **☐** | 17 **☐** | 18 **☐** | 19 **☐** | 20 **☐** |
| Put together list of things that are changing. Regulations that are being removed, etc. Send update to all your contacts | Study your niches again. What’s changed in the last two weeks? Identify anything new that you can bring to in that space to clients and prospects. | Check in on your COI’s. Share 1 or 2 things you’ve learned they can pass on to their clients. | Quick Check in with clients and prospects. | Quick check in with clients and prospect |
| Find someone you are thankful for and express that to them today.  Read for 20 Minutes | Read for 20 Minutes | Read for 20 Minutes | Identify 1 area of abundance  Read for 20 Minutes | Read for 20 Minutes |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 21 **☐** | 22 **☐** | 23 **☐** | 24 **☐** | 25 **☐** |
| Connect with your COI’s. Make connections they need where you can. | Offer to review Recovery Plan with clients via video with clients and prospects | Check in with Chamber, Associations and other local networks. Provide an article, white paper, video or some value piece | Do an Insurance review with your clients and prospects online. What updates and changes do they need to understand? | Review your prospect list and your progress – Who has fallen through the cracks. Make a Plan. |
| Read for 20 Minutes | Read for 20 Minutes | Read for 20 Minutes | Read for 20 Minutes | Read for 20 Minutes |
| 26 **☐** | 27 **☐** | 28 **☐** | 29 **☐** | 30 **☐** |
| Execute a Plan from day 25 | Identify any changes – Regulation updates, community changes, etc. | Push all relevant information to your clients, prospects and network. | Engage the chamber and other networks around your learning over the last 28 days. | Quick client check in! Make the call and ask them if there is anything you can do for them. |
| Books to Read | Fanatical Prospecting – Jeb Blount | Getting Naked – Patrick Lencioni | Seeing the Big Picture – Kevin Cope | The Challenger Sale – Brent Adamson |
| Health Commitments | Sleep Commitment | Exercise Commitment | Healthy Eating Commitment | Positive Focus Commitment |