

Producer Beliefs and Behaviors Review

Elite	Rating	Poor
Plan and work the plan purposefully	10 9 8 7 6 5 4 3 2 1	No plan
Build plan off reality of market and my potential	10 9 8 7 6 5 4 3 2 1	Work a plan based on 20+ yr quotas
Know My Numbers and Adjust	10 9 8 7 6 5 4 3 2 1	Wing it and make calls when I have time
WOW my clients to get proactive referrals	10 9 8 7 6 5 4 3 2 1	Just do my job with clients
Business Acumen of Interest	10 9 8 7 6 5 4 3 2 1	No proactive work on business acumen
Conversion training is a priority	10 9 8 7 6 5 4 3 2 1	Never work on Conversion
Frequent refresh to keep sales process energized	10 9 8 7 6 5 4 3 2 1	Doing the same thing I have always done but hope for a better result
Use emotional intelligence and ask for business often	10 9 8 7 6 5 4 3 2 1	Only ask for business at the end of the sales process (if even then)
Make Productivity a focus for life	10 9 8 7 6 5 4 3 2 1	Allow all types of bad habits to take my time
Plus One Mindset	10 9 8 7 6 5 4 3 2 1	Don't even hit my targeted prospecting activity, much less plus one
Know who my new clients will be next year	10 9 8 7 6 5 4 3 2 1	My new clients will show up when they show up
Show Up and Be Present	10 9 8 7 6 5 4 3 2 1	Schedule is chaos - easily distracted - not focused - major up and down days
Interested in...	10 9 8 7 6 5 4 3 2 1	Not learning with purpose or already know all I want to know
Seek opportunities to be uncomfortable	10 9 8 7 6 5 4 3 2 1	Ego gets in way of showing I have weaknesses.
Don't Lose and No Excuses	10 9 8 7 6 5 4 3 2 1	Can make excuses for any substandard performance. I can always blame anything but me.