**Insurance Sales Behavior Goals**

Sales are the result good habits, not sales quotas!

**My Big Goal is to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Here’s how I’m going to achieve it:**

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| --- | --- | --- |
| **Behavior** | **Achieve?** | **Notes** |
| I will ask \_\_\_\_ clients for referrals to my agency… |  |  |
| I will attend \_\_\_\_ local networking events… |  |  |
| I will send \_\_\_\_ LinkedIn Connection requests… |  |  |
| I will make \_\_\_\_ outbound sales calls… |  |  |
| I will cold-call \_\_\_\_ local businesses in person… |  |  |
| I will hand out \_\_\_\_ business cards… |  |  |
| I will collect \_\_\_ x-dates from existing clients… |  |  |
| I will bring up life insurance with \_\_\_\_ current clients… |  |  |
| I will talk to \_\_\_\_ clients about increasing their coverage… |  |  |
| I will ask \_\_\_\_ customers to have an annual coverage review… |  |  |
| I will give \_\_\_\_ referrals to my current clients… |  |  |
| I will plan and prioritize my day before it begins… |  |  |
| I will attempt to overcome \_\_\_\_ objections… |  |  |
| I will connect with \_\_\_\_ existing professional connections … |  |  |
| I will eat lunch with professional connection \_\_\_\_ times… |  |  |
| I will contact every new lead within \_\_\_\_ minutes… |  |  |
| I will do \_\_\_\_ random act(s) of extraordinary customer service… |  |  |
| I will… |  |  |
| I will… |  |  |
| I will… |  |  |

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