



Million Dollar
Producing Team
Tool Kit

**CLAIM YOUR SEAT
AT THE ROUND TABLE™**

Success Summit for Million Dollar Insurance Agents & Financial Advisors



Team Training Quick Reference Guide

Nine Ingredients for a Successful Team Training

1. Set an Intention before the Team Training – *something you hope to get for yourself and your business out of it*
2. Have Team members set an Intention for themselves – *something they hope to get out participating*
3. Prepare everyone prior to the Team Training by giving them all the details they'll need to arrive on time
4. Have Team members complete their Job Descriptions and "What You Can Count on Me For" prior to arriving
5. Provide light, energy increasing snacks like nuts or protein bars – sugar drains energy quickly
6. Hold the Team Training OFFSITE to raise energy
7. Consider Team Training a process, not a one-time event
8. Do not allow cell phones or computers or any electronic devices to be turned on during the Team Training
9. Set the tone for open dialogue so no one feels stifled
10. Have FUN!

Checklist for Team Training

- Whiteboard with dry erase markers & eraser
- Easel
- Post It Easel Pad
- Markers
- Values lists
- Paper & Pens (or Workbooks) for Team Members
- Tape
- Bottled water
- Energy Snacks
- Tissue
- Napkins
- Snack plates (if necessary)

Part I: Creating a Shared Vision and Defining Values

Create a SHARED Vision & Define Values

1. Before the Team Training, create Your Vision for the business so you have a sense of what is important to YOU
2. At the Team Training have them share what *they* see as the Vision of your company
3. You can conduct this exercise by having one Team member (or you) be the Scribe and write down all the things that come to mind for the Team members. If you do it this way, first Ask the Questions:
When someone leaves our office after having engaged in our services, what is the experience they have?
Once we've done our best and taken care of a client, how has their life benefitted? What about their life is better?
4. You may also do this exercise by having everyone bring a couple of old magazines and create a visual representation. You'll want to tape the images to the large easel so that together, a "picture" of how it is being a client of yours starts to emerge. Just remember, this isn't a Goal Board. It's a way to get to what the EXPERIENCE you provide to your ideal clients.
5. Once you've come up with what the Vision "feels" like, have someone summarize it in 2 or 3 sentences and record it.
6. Next, give them a list of VALUES they can peruse. Ask them to choose 5 or 6 that they feel strongly about *personally*.
7. After 5-10 minutes, ask the Team to share their list, taking turns
8. On the easel or whiteboard for everyone to see, write down the ones that several people have in common.
9. Then ask the group to state what they believe the company stands for
10. Keeping in mind those values that you wrote which they shared as a common starting point, have them write a sentence that combines both the Business Vision AND the Values that you honor when doing business with people. Sometimes this takes several tries, so be patient. Make sure everyone has a chance to contribute to this combined exercise or you will lose the collaborative nature.
11. Be sure to put this statement in writing where Team members and clients can see it regularly.

Tips for Creating the Collaborative Plan (6 months or 12 months is ideal to start)

- When creating the Collaborative Plan, you may include projects in addition to revenue goals (IE:, support a local charity as a Team)
- Remember for each goal, write in the PEOPLE who will complete the ACTIVITIES that it will take to achieve the goals
- Right before this exercise is a good time to have everyone share out loud what they believe are their responsibilities in their job AND what the team can count on them for (This serves as another accountability tactic.)
- Don't forget to mark goal deadlines, milestones and checkpoints in the Office shared calendar.
- Make certain everyone knows who will do what, by when as well as who is responsible for what – and to whom they are accountable for fulfilling the goals on the Collaborative Plan. **BE CERTAIN EVERYONE GETS A WRITTEN COPY OF THE PLAN AFTER TEAM TRAINING.**



90 Day Action Plan for Success

Team Member MUST acknowledge that he/she has not met his/her individual goals for the prior thirty (30) day period, as was previously agreed to by him/her.

Team Member must sign off that he/she understands that he/she is now on a 90-Day Action Plan for Success and that all documentation regarding this 90-Day Action Plan will be retained in his/her personnel files.

There will be written reports for Agent /Advisor and Team Member to sign at each incremental meeting, including 30 days, 60 days and 90 days.

If Team Member does not perform or reach his/her goals for ninety (90) consecutive days, he/she will no longer be employed at this Agency/Firm.

Team Member must understand the document shall serve as his/her written warning that his/her production results are sub-standard and do not meet the minimum requirements of his/her position.

The Action Plan will be individualized depending on Team Member responsibilities for Agency or Firm.

The Action Plan must include:

- Statement of 90 day goals for THIS Action Plan
 - Goals may include actual number of sales, dollars in sales, activity targets, etc. Goals shall be determined by the Agent / Advisor prior to the Action Plan meeting.
 - Goals may be amended from the original company goals, if appropriate, during probationary period in order to make incremental progress. However these should not deviate more than 15% from standard Agency / Firm expectations.
- Date by which each stated result can be expected
 - These should be broken down by each 30 day period such that at 90 days, the complete goal has been obtained
- Resources Team Member needs to reach his/her goals
- Tracker of Activities and Goals
- Dates of 30 day, 60 day and 90 day follow up meetings

Evaluation and Accountability

At the end of the first thirty (30) days, the results will be evaluated and if a) Team Member accomplished what was outlined in the Action Plan and b) is on positive path for growth/production the Plan will be deemed complete and signed off by Team Member and Agent/Advisor.

If Team Member has not attained goals 100% during this initial period, there will be another evaluation in 30 days and another in 60 days from the first meeting when the Action Plan was initially signed.

Team member must know which tracking and production reports will be needed for this meeting.

Team member will be responsible for bringing these items to the meeting.

If Team Member does not have these items available at the time of the meeting, there will be no evaluation meeting, with the understanding that:

- 1) Meeting may be rescheduled within three (3) business days or meeting may be annulled at the Agent's / Advisor's discretion.
- 2) Annulment or postponement of the meeting does not release Team Member from the obligation to provide documentation to Agent / Advisor and Team Member must do so within twenty-four (24) hours.
- 3) Annulment or postponement of the meeting does not extend the total ninety (90) day evaluation period.

If all goals are met 100% and Team Member is on a notably positive path for growth/production, the plan will be deemed complete and signed off by Team Member and Agent/Advisor.

On the 90th day from the initial Action Plan meeting, a final meeting shall occur, during which an evaluation of all Action Plans during this period will be reviewed.

* Note that this process shall be noted in the Employee Policy Manual and shall be included in any and all Producer training so that Producer is clear of the consequences in the case of consistent sub-standard production.

One-to-One Accountability Meeting:

Team Member: _____

Meeting Date: _____

Accolades – What successes from the week can you celebrate – What went well?

Needs –What training is needed to help you better perform in your current role and meet your goals?

Adjustment - What adjustment in action and/or activity will you make to reach/exceed your goals?

Daily Sales Activities	Monday	Tuesday	Wednesday	Thursday	Friday	Week Total
Calls Made:						
9:00am->11:00am						
11:00am->1:00pm						
1:00pm->3:00pm						
3:00pm->5:00pm						
After 5:00pm						
Appointment(s) Set:						
9:00am->11:00am						
11:00am->1:00pm						
1:00pm->3:00pm						
3:00pm->5:00pm						
After 5:00pm						
Appointment(s) Conducted:						
9:00am->11:00am						
11:00am->1:00pm						
1:00pm->3:00pm						
3:00pm->5:00pm						
After 5:00pm						
Marketing List(s) Used:						

Support – What assistance do you need from your Agent / Advisor?

One-to-One Accountability Meeting:

Team Member: _____

Meeting Date: _____

Accolades – What successes from the week can you celebrate – What went well?

Needs –What training is needed to help you better perform in your current role and meet your goals?

Adjustment - What adjustment in action and/or activity will you make to reach/exceed your goals?

Weekly Sales Activities	Monday	Tuesday	Wednesday	Thursday	Friday	Total
Calls Made						
Type 1 Appointment(s) Conducted						
Type 2 Appointment(s) Conducted						
Type 3 Appointment(s) Conducted						

Weekly Production	Written	Pending	Issued	Goal	Variance
Category #1					
Category #2					
Category #3					
Category #4					

SUPPORT – What assistance do you need from your Agent / Advisor?
