

Client – 2026 Business Plan – Goal Builder (Insurance)

Client Name: _____

Date: _____

In 2026 I am: (use present tense and project to year end describing the goals you will achieve)

Core Values: describe those values that you will not compromise even if it means leaving your profession if necessary

Core Purpose: describe the idealistic motivation for doing your work-soul of what and why you do your business

Envisioned Future: describe briefly what your business looks like in 3, 5 years

BHAG (Big, Hairy, Audacious Goal): describe that huge goal that will take extraordinary effort to accomplish

Hedge Hog Concept

What are you deeply passionate about? _____

What can you be the best in the world at? _____

What drives your economic engine? _____

Personal Development Goals:

<u>Development</u>	<u>Action Plan</u>	<u>Target Date</u>	<u>Completed Date</u>
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1.

2.

Coach's Career Development Goal for Client:

<u>Development</u>	<u>Action Plan</u>	<u>Target Date</u>	<u>Completed Date</u>
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1.

2.

Business Plan – Goal Builder - 2025 vs. 2026

	<u>2025</u>	<u>Actual</u>
1. Base salary:	_____	
2. Commission:	_____	
3. Bonuses:	_____	
4. 2025 income:	_____	
5. #units sold:	_____	
6. Avg. \$ per unit:	_____	(#4. divided by #5.)
7. Gross sales volume	_____	

Circle the type your 2026 goal represents: Minimum Attainable Stretch

<u>2026 Goal</u>	<u>Annual</u>	<u>YTD</u>	<u>Remaining</u>
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A. Base Salary:			
B. Commission:			
C. Bonuses:			
D. 2026 income:			
E. # of units sold:			
F. Avg. \$ per unit:			
G. Gross sales volume			

Projected annual increase: _____ % income increase _____

2025 Final Results – By Product

Product	2025 Units Sold (A)	Premium Volume (B)	Comm. Paid (C)	Avg. Premium	(C ÷ A) Avg. Comm. Paid
Product #1: (Describe)					
Product #2: (Describe)					
Product #3: (Describe)					
Product #4: (Describe)					
TOTAL					

2026 Annual Goal – By Product

Product	2026 Units Sold (A)	Premium Volume (B)	Comm. Paid (C)	Avg. Premium	(C ÷ A) Avg. Comm. Paid
Product #1: (Describe)					
Product #2: (Describe)					
Product #3: (Describe)					
Product #4: (Describe)					
TOTAL					

2026 Monthly Goals – By Product (If Seasonal Fluctuation)

Month	Product	Units Sold	Premium Volume	Comm. Paid	Month	Product	Units Sold	Premium Volume	Comm. Paid
Jan.	1				July	1			
	2					2			
	3					3			
	4					4			
	Total					Total			
Feb.	1				Aug.	1			
	2					2			
	3					3			
	4					4			
	Total					Total			
Mar.	1				Sept.	1			
	2					2			
	3					3			
	4					4			
	Total					Total			
Apr.	1				Oct.	1			
	2					2			
	3					3			
	4					4			
	Total					Total			
May	1				Nov.	1			
	2					2			
	3					3			
	4					4			
	Total					Total			
June	1				Dec.	1			
	2					2			
	3					3			
	4					4			
	Total					Total			
Jan. – June 6 MONTH TOTAL					July – Dec. 6 MONTH TOTAL				
July – Dec. 6 MONTH TOTAL									
GRAND TOTAL									

2026 Average Monthly Goals (take annual goal and divide by 12)

Product	# Sold / Closed (A)	# of Presentations Needed (A divided by 75%)
Product #1: (Describe)		
Product #2: (Describe)		
Product #3: (Describe)		
Product #4: (Describe)		
TOTAL		

2026 Weekly Goals (take monthly goals and divide by 4)

Product	# Sold / Closed (A)	# Presentations (B)	# Appts Set (B x 2) (C)	#Reaches/ Contacts (C x 10) (D)	# Dials/Attempts (D x 3) (E)
Product #1: (Describe)					
Product #2: (Describe)					
Product #3: (Describe)					
Product #4: (Describe)					
TOTAL					

2026 Daily Goals (take weekly goals and divide by 5)

Product	#Dials/ Attempts	#Reaches/ Contacts	# Appts Set	# of Presentations
Product #1: (Describe)				
Product #2: (Describe)				
Product #3: (Describe)				
Product #4: (Describe)				
TOTAL				

If I reach my daily goal(s) my reward will be: _____

If I reach my weekly goal(s) my reward will be: _____

If I reach my monthly goal(s) my reward will be: _____

If I reach my annual goal my reward will be: _____

Resources/skills/systems etc. needed to accomplish goal: _____

My game plan to acquire those items are: _____

I, _____ commit to strive to do my very best each day to improve and grow. I will review this plan daily and will do whatever it takes to accomplish my goals. I will be positive and enthusiastic and reward myself as stated above. I will strive to grow in all areas of my life. I believe I can and will achieve my goals.

Client

Date

Coach

Date