



Insurance - Client Mid Year Review

Name: _____ Date: _____

Company: _____ Years in Business _____

1. My best year ever was _____ (year)

(a) Policies sold: _____ GWP: _____ Commission _____

2. My 2026 goal is: _____ Gross Written Premium

_____ Commission

_____ Policies

3. My goals are written: Yes _____ No _____

4. My goals (business plan) are broken down to daily numbers? Yes _____ No _____

5. My year to date numbers are:

_____ GWP

_____ Commission

_____ Policies

6. I am ahead _____ behind _____ on track _____ to reach my 2026 goals. (Check one)

7. The reason my business is growing / declining is: _____

8. Rate the following peak performance areas on a scale of 1-5 with 5 being high and your skill/proficiency in the following disciplines:

Skill Rating: 5-Excellent, 4-Good, 3-Average, 2-Fair, 1-Poor

	Consistency Disciplines	Rating (1-5)
1.	Actively prospects daily / consistently	
2.	Time management: plans work; schedules by appointment; sets time for HPOA	
3.	Controls: business; client expectation; time	
4.	Effectively utilizes a contact management system to manage leads / clients and ensure proper follow up	
5.	Has specific written goals / plans and reviews regularly	
6.	Utilizes a scripted process and routinely role plays / rehearse	
7.	Regularly sets time to work and improve business (business development)	
8.	Consistently works on self-improvement: books, CD's, training	
9.	Consistently contacts sphere / past to gain referrals	
10.	Tracks production and understands: sales conversion ratios, YTD numbers, lead source %	
	Rank _____	Total

Consistency Ranking	
<u>Score</u>	<u>Rank</u>
45 - 50	Thrivers
30 - 44	Surviving Thrivers
15 - 29	Sandbagger
0 - 14	Statistic (or soon to be)

	Persistency Disciplines	Rating (1-5)
1.	Identifies all smoke screen objections and has a strategic response for each one?	
2.	Gets to the bottom line objection and rarely gets stalled in the sales process	
3.	Appropriately follows up with warm/hot leads and utilizes a contact management system	
4.	Possesses a never give up attitude	
5.	Perseveres well through trials, tribulations and challenges	
	Rank _____	Total

Persistence Ranking	
Score	Rank
21 - 25	Thrivers
16 - 20	Surviving Thrivers
11 - 15	Sandbagger
0 - 10	Statistic (or soon to be)

	Attitude Disciplines	Rating (1-5)
1.	Sees the opportunity in the problem	
2.	Sees attitude as determining altitude (success level)	
3.	Spends more time encouraging/motivating others than others motivating/encouraging self	
4.	Positively project: self, company and opportunities	
5.	Positively deals with the brutal facts and doesn't let Pollyanna cloud reality	
	Rank _____	Total

Attitude Ranking	
Score	Rank
21 - 25	Thrivers
16 - 20	Surviving Thrivers
11 - 15	Sandbagger
0 - 10	Statistic (or soon to be)

	Confidence Disciplines	Rating (1-5)
1.	Projects a high level of confidence to accomplish task	
2.	Prospects / clients routinely select you as their preferred agent over competitors	
3.	Has an overall high self confidence level	
4.	Has a high confidence level in company and management	
5.	Has a high confidence level in personal inventory/service/product line	
	Rank _____	Total _____

Confidence Ranking	
<u>Score</u>	<u>Rank</u>
21 - 25	Thrivers
16 - 20	Surviving Thrivers
11 - 15	Sandbagger
0 - 10	Statistic (or soon to be)

Overall Peak Performance Rank

Consistency: Rank _____ Score _____

Persistence: Rank _____ Score _____

Attitude: Rank _____ Score _____

Confidence: Rank _____ Score _____

Overall Rank _____ Total _____

If your overall score is between:	108 -125	= Thrivers
	78 -107	= Surviving Thrivers
	48 - 77	= Sandbagger
	0 - 47	= Statistic (or soon to be)

9. My outlook on the market is:

10. My commitment level to succeed in this market is: (scale 1-10 with 10 being high)

11. The disciplines, mindsets and skill sets I need to implement immediately to ensure I thrive and run at peak performance are: (Refer to Peak Performance rating and write down any discipline you scored 3 or lower on)

12. My game plan to implement the above disciplines is: _____
and advance my business now.

13. I am receiving my business development support from:

Manager / GA _____	Self _____
Mentor / Coach _____	No one _____

14. I have a well-defined sales process that I follow and know where the sale failed if it does.

Yes _____	Somewhat _____
No _____	



The 6 Foundational Corners Checklist

		Yes	No	Partial
1.	<u>Business Plan</u> I have a well-defined business plan in place – down to specific daily goals, I also review my plan regularly.			
2.	<u>Time Management /Blocking</u> I time block my day, control time, clients and accomplish my tasks when I want to. I schedule appointments when I am available.			
3.	<u>Prospect Plan</u> I know my primary lead sources and have a plan to contact them on a regular basis. I prospect daily and make the number of contacts my business plan states to make each day.			
4.	<u>Database Lead Management</u> I manage my leads from the same CRM, log all my conversations and outreach attempts.			
5.	<u>Sales Process</u> I have a well-defined sales process that I follow and know where I missed a step. I help my clients buy their way and my sales conversions are very high.			
6.	<u>Production Tracking</u> I know my: conversion ratios, listing days on market, sale pending numbers, average sales price/commission and how my YTD numbers stack up against my goals.			

The areas I answered no or partial are: _____

My game plan to improve is: _____

