AIM GROUP

FINANCIAL PROFESSIONAL | BUSINESS STRATEGY PLANNER

A focused, measurable weekly plan for production, prospecting and professional growth

Professional / Agency **Planning Month**

01 COMMISSION & PRODUCTION GOALS

Monthly commission income goal $ **Current commission level(s)**

LIFE INSURANCE

Annualized paid premium goal $

Agent rate % Annualization %

ANNUITIES

Issued & paid premium goal $

Agent payout rate %

Life est. commission = paid annualized premium x agent rate x applicable annualization factor.

Annuity est. commission = issued-and-paid premium x agent payout rate. Use actual carrier rates.

Expected life commission $ **Expected annuity commission $**

02 TARGET MARKETS & LEAD GENERATION

Primary audience / niche

Secondary audience / niche

Lead sources (referrals, existing clients, community, events, digital)

New leads / week **Cold calls / week** **Appointments / week**

03 WEEKLY ACTIVITY SCHEDULE

DAY	PROSPECT / CALL	FOLLOW-UPS	CASE WORKFLOW	EDUCATION / REVIEW
MONDAY				
TUESDAY				
WEDNESDAY				
THURSDAY				
FRIDAY				

Suggested rhythm: daily prospecting + follow-up; weekly pending-case review; protected carrier training time.

04 ADVANCED EDUCATION & WEEKLY SCORECARD

Product / carrier topic **Mentor / training date**

Actual calls **Appointments** **Apps submitted** **Issued / paid**

One improvement for next week