

At the end of the day, **it's all about results.** You owe it to yourself, your clients, and your team to ensure that you are getting the best results you can. If you're not, something will need to change. You will either need to change your current behaviors, or you will need to change your goal. I hope you choose the former.

—Kevin Trokey, President & Coach, Benefits Growth Network



Proactively Managing the Sales Pipeline

One common theme really seems to hold producers back from realizing their full potential: a lack of **planning and accountability**. It's a shame really, and completely unnecessary.

Commissions are lagging indicators of results

Producers often seem to be off limits when it comes to setting expectations and monitoring the right results.

“As a producer, I have the ultimate accountability because I am paid on commissions.”

Commissions *do* demonstrate your production success; **however**, by the time you can measure production, **it's too late** to make any adjustments that will impact the results. Production results are a lagging indicator and only tell you what has, or hasn't, already happened.

Behaviors are leading indicators of results

If you hope to have an opportunity to make adjustments, you have to identify the **behaviors**, which are the **leading indicators that drive the production results**.

Many of the same personality traits that make producers successful, at a certain level, also become an impediment to even greater success. Producers tend to approach their days, weeks, even the year in too random a fashion. They wander into the day or the week and just wait to

see what finds them now. While the good producer will stay busy, and probably even hit their sales goal, they will miss an opportunity to become a great producer because they aren't purposeful enough about how they are spending their time.

Weekly Planning is a Key to Success

The answer is really simple, or at least part of the answer: Take time at the beginning of the week to **plan** for those critical have-to items you need to accomplish, and then make yourself **accountable** for completing them each week.

Complete the following weekly planning and review tools for four straight weeks, and you will see the behavioral and production results needed to become that **great producer**.

1

Identify the top two actions you need for the week in each of the following areas:

- a. **Sales Development** (example - develop a new 30 second commercial, role play my presentation, or attend a seminar to further my business acumen)
- b. **Prospecting** (example – schedule five new opportunities, make X# of cold calls, or ask for X# of referrals)
- c. **Clients** (example – have a Healthcare Reform overview meeting with two clients or take a referral to your best client)
- d. **Centers of Influence** – (example – set up a lunch with a potential COI or take a list of targeted prospects to a specific COI)

2

Share your list with someone who will help hold you accountable such as your support team, your sales manager/leader, or other producers. Ask them to ambush you throughout the week and ask about your progress.

3

Report the Results of your action items from the week (reporting can be as simple as “did it” or “missed it”).

This does not have to be super detailed, and it doesn't have to be time consuming. In fact, once you have done this for a couple of weeks, you should be able to do your week's planning and the prior week's reporting in less than 15 minutes.

The bottom line is this:

If you **plan for your week once** and then spend the week **executing on your commitments**, the week, and you, **will be a success.**

BGN Weekly Top Two

An exclusive offering of Benefits Growth Network.

Week of: _____

Name: _____

	Sales Development	Center of Influence	Prospects	Clients
Item #1				
Action				
Results				
Item #2				
Action				
Results				

BGN Weekly Pipeline Review

An exclusive offering of Benefits Growth Network.

Week of: _____

Name: _____

Topic	Minimum	Target	Ideal	Points
5 # of times to tell story this week	To anyone who will listen 3 Points	At least 3 to a Center of Influence or prospect 9 Points	All to a Center of Influence or prospect 15 Points	
10 Sales related appts. on calendar	On calendar 2 Points	Within the next month 6 Points	Within the next 2 weeks 10 Points	
20 Prospects in pipeline	All meet Minimum Account Size 1 Point	½ >= Target Account Size 3 Points	All meet Target Account Size 5 Points	
			Total Points for Week	

Definitions

5/10/20	Definitions
5X	Telling the story of your unique process: how is it unique and why it is important to delivering client value (the 1 st step in your formal sales process).
+10	Having a meeting scheduled with a prospect that is one of the steps in your formal sales process.
20	Prospect is defined as someone who knows you are working to make them a client and is somewhere in your formal sales process.