**Behaviors**

* Develop your Personal Business Plan
* Execute the Trade Down
* Lead your High Performance Team
* Issues/Risk Fact Sheet or Development and Studying
* Developing your Business Acumen
* Comfort around Emerging Risk and Issues
* Proactive Management of Relationships (Prospects, Clients, COIN’s, Team)
* Pipeline Development
* Proactive Retention
* Attitude
* Dress
* Expanding your Network
* Make Calls
* Effective Presentation Skills
* Pre-work and Prep on Prospects
* Client Retention Relationships
* Generating and Asking for Referrals
* Asking Quality Questions
* Be Effective in Sales System. Being Conversational and Comfortable with the Following:
  + Describing the Sales Process
  + The Risk Opportunity
  + Insurance and Stuff vs the Risk Opportunity
  + Entire Assessment
  + Final Plan Presentation
  + Continuation Meetings
* Discovery of your Unique Abilities and Working Inside of those Unique Talents 80% of the Time
* Producer Time Management and Productivity
* Target and Minimum Account Size
* Filling out Target Account Strategy Plans
* Low Risk Practice
* Profile your Accounts
* Know your Value Added Services and the Value Brought to the Client
* Practice Listening Skills

**Tools**

* 80/20 Analysis. (Book of business analysis)
* Trade Down Process and System
* Execute the High Performance Team Contracts
* Building the Value Added Services/Results/Questions Tool
* Determining Agency Policy on Target and Minimum Account Size
* Develop the Assessment, Plan Presentation, and Stewardship Reports
* Creating Process to Execute the Assessment, Plan Presentations, and Stewardship Reports (Backstage)
* Provide Sales Tracking Systems
* Create an Account Profile Tool
* Sales Training
* Sales Coaching
* Sales Mentoring
* Access to InCite Resources
* Development of Value Offerings (Products and Services)