Brightway® INSURANCE

Ponte Vedra Beach

Business Plan

Sample Employee

What Winning Looks Like

1. Dressed professional
2. Arrive on time & ready to work
3. Leave things better than you find them
4. Positive attitude while never taking the client for granted
5. Great at building relationships
6. Every call answered in 2 rings with emphasis on over serving
7. Emails cleared out end of day
8. All signed apps attached prior to effective date
9. Every fax, phone or Email professional & immediate
10. Cancellation report produced
11. Renewals/price increases/Non-renewal campaign
12. Make sure each client is offered all 5 lines of business with us
13. End every call with "Thank you for being the best part of Brightway"

YOUR CURRENT LEVEL **2**	CROSS SELL # OF LINES OF BUSINESS **5**
SALES GOAL PER WEEK **$10,000**	EXECUTIVE OF BELONGING **BIRTHDAYS** ORGANIZE QUARTERLY HH

EXTRA RESPONSIBILITY

RESPONSIBLE FOR KEEPING PASSWORDS UPDATED

Perfect Month

- *300+ CALLS*
- *4 PARTNER MEETINGS*
- *2 TCP CALLS*
- *PLAN $10,000 PER WEEK*

Weekly Expectations

1. One coffee with Center of Influence
2. 25 new impressions with Centers of Influence
3. Suspense screen and Emails are all complete by Friday EOD
4. Answer over 80 inbound calls each week

Quarterly Expectations

1. 5 new referral sources added
2. 10 new Google reviews
3. QA score above 90%
4. 3-5 speaking engagements with referral partners
5. 1 Realtor or Lender presentation completed

Salary and Benefits

SALARY: $35,000

25% NEW

10% RENEWAL

RELATIONSHIP BONUS $100 FOR A NEW COI THAT SENDS 5 LEADS

MEETING BONUS $200 FOR REALTORS OR LENDERS

HEALTH INSURANCE

DENTAL INSURANCE
LIFE INSURANCE

TALK SPACE-COUNSELING SESSIONS TO BE USED AS NEEDED

SIMPLE IRA WITH 3% MATCH

12 DAYS PTO

1/2 DAY FRIDAYS ON ROTATION

DEBT REDUCTION MATCH - $1,000 MUST BE PAID TOWARD ADDITIONAL DEBT