

ACTION PLAN 1

- S** Specific
- M** Measurable
- A** Achievable
- R** Relevant
- T** Time bound

What is your goal? What do you want to achieve? From what metric? To what metric? By what date?

I would like to increase our Finance PVR from \$1,700 a copy to \$2,000 a copy by ~~December 2023~~ March 2024

BOTTOM LINE: Benefits of Achieving Your Goal

- Better commission for Finance manager
- Better commission for sales person
- Increased selling skills
- Positive culture for Finance department
- More \$

Consequences of Not Achieving Your Goal

- Negative culture
- "I cant sell anything" mindset
- Less \$ for employees
- Broken down process

When will you start?

September 1st 2023

How will you gauge your progress? When? Using which metrics?

I will utelize our leaders from Zurich insurance to make sure we are on the same page, I will meet w/ finance managers twice a month and I will print off daily reports through Reynolds so I am always updated on where we stand.

What specific actions will you take to achieve your goal? Who can help you?

- I will revisit our current sales process and determine if it is setting us up for success.
- I will convene w/ our leaders from Zurich insurance to make sure they know my plan and give them motivation to carry it out.
- I will include my brother in order to track metrics when I am gone and keep me accountable in staying true to my goal.
- How are salespeople introducing their customers to Finance? Do they prep the customer? Is there a conversation between the sales person and finance about the customer's interests or what they have bought in the past?

Potential Challenges?

- Diva attitude from Finance managers
- "It's a process problem not a selling problem"
- Complacency

Potential Solutions?

- Increase motivation by getting them excited to sell.
- Improve communication between the sales person and the finance manager.
- Focus on a positive and natural turn from sales to Finance.