

## New Agent Goals Worksheet

### Income Goals

1. Rolling 12 Month Income Needed \$\_\_\_\_\_ Why is this goal important to you?
2. Year 2 Income Goal \$\_\_\_\_\_ Why is this goal important to you?
3. Year 5 Income Goal \$\_\_\_\_\_ Why is this goal important to you?
4. Year 10 Income Goal \$\_\_\_\_\_ Why is this goal important to you?

### Working Backwards

- A. Take #1 above (Income Needed) \$\_\_\_\_\_ & divide it by 50 Working Weeks = \$\_\_\_\_\_/Week B. Take Income Needed Per Week \$\_\_\_\_\_ & divide it by the Average Advance Paycheck Per Policy (Key) \$\_\_\_\_\_ = \_\_\_\_\_ Number Apps To Sell/Week
- C. Take Your Number Apps To Sell Per Week \_\_\_\_\_ & divide it by the Average # Policies Per Customer (Key) \_\_\_\_\_ = \_\_\_\_\_ Number New Customers/Week
- D. Take your Number New Customers/Week \_\_\_\_\_ & multiply by 2 (2 demos to get new customer) = \_\_\_\_\_ Demos Per Week Needed

Now you know exactly how many full and complete customer demonstrations you need to do every week to achieve your annual income goal! Remember every 1-hour of phoning or field prospecting you will set up an average of 2 demo appointments.

### Numbers Key \*

- **Annual Premium Per Policy: \$1,000**
  - **Advance Paycheck Per Policy: \$210**
  - **# Policies Per Customer: 1.5**
  - **Closing % Cold Demo: 30%**
  - **Closing % Demo by Appointment: 50%**
  - **Closing % Referral Demo: 50%**
  - **Average Life Of Policy: 16 years \*Numbers Based On Company Averages**
- \*Does not take into account bonus & incentive earnings**