



CSR/Producer Sales Performance Development Program

Coaching Job Aid

Initiative	Check all that apply	Questions
Goal Setting	☐	What (personal and) business goals are you working toward achieving?
	☐	What new business must you close monthly to achieve your annual New Business goals?
	☐	Have you identified the high payoff activities ("HPA's") necessary to achieve these goals?
Priority Management	☐	What is currently on your High Payoff Activity List?
	☐	What is on your "Ta Da" list this week?
	☐	What level 1's were accomplished last week/are scheduled on your calendar this week?
	☐	Are you utilizing the Polestar library?
Referral Harvesting	☐	Who is on your list to request referrals from?
	☐	Do you have a weekly referral request goal? What is it?
	☐	What is your referral request "script"?
	☐	How are you keeping track of the status of referrals (referrer and referee)?
	☐	Who have you asked this week?
Cross Selling/Account Rounding	☐	Have you identified your cross selling/account rounding opportunities by client?
	☐	How are you approaching the cross sell/account rounding initiative? (at renewal only or ongoing)
	☐	How are you tracking your cross sell and account rounding status?
Differentiation and Value Added	☐	What questions do you ask clients and prospects to determine which services and coverage needs they value the most?
	☐	How would you describe (differentiate) your chosen carrier from other carriers?
	☐	What are some of the features/benefits of your agency?
	☐	Are agency/carrier features/benefits included in your proposal? How are they included in the sales process to differentiate value vs price only?
Additional Questions	☐	

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