

LEADER'S GOAL PLANNING 2020

My M. A. P. A. Planning 2020

- Manpower 人力 - Number of Agents, the retention ratio and their experience levels.
 - ✓ Manpower = # of Existing Agent + # of New Agent
- Activity 活动率 - Average Number of Calls
 - ✓ Activity Ratio = # of Agent In-force cases / Total Manpower
- Productivity 生产力 -
 - ✓ Productivity of Active Agent (AA) = Total NOC in-forced by AA / # of AA
 - ✓ Productivity of All Agent = Total NOC / Total # Manpower
- Average case size 平均每宗保费

$$M \times A \times P \times A = ANP$$

Note: with defined time frame



My First Step:

- ✓ My _____ Plan
- ✓ My _____ Plan
- ✓ My _____ System

Questions to ponder for your planning:

My Recruitment Plan

- Who are my recruiter/s?

- Who are my C.O.I. for recruitment?

- What recruitment activities/campaign/incentives in Q1 | Q2 | Q3 | Q4?

- What is my recruitment process? Should I improvise my recruitment process?
What are the steps will I take?

- What is my current recruit profile?

- What source of recruits might yield the best people?

- Where will I source for the potential candidates?

- Why should people join my agency?

- What stories of success can I tell?

- Will I conduct assessments?

- How will I decide if they have a natural Market?

- Once I have the names how will I approach?

- When will I conduct Interviews?

- How many interview per Day/Week/Month?

- Will I do Career Seminars? Who? Where? When?

- What resources will I need? Personal/Company?

- How will I train them?

- Joint Field-work - who will do? How many times?

- What do I need to do to prepare them?

- What impact might this have on your production –short medium term?

- Does the recruits' family support their activities?

- Are my recruits the bread winner of the family?

- How will I know they will work hard?

- Will I expect them to attend the office daily?

- Will I expect them to report activities daily?

- How will I apply close activity management? (so that you would describe to the candidates what you will do for their early success.)

- How can I improve retention rate?

My Training Plan

- What is the real potential of your current teams markets? (market analysis)

- What assessment have I done for my teams and USM teams marketplace?

- How effective are my Managers and Agents currently? (their sales and recruitment success ratio)

- Am I operating a Product Push or Needs-Based-Sales Process?

- Does my team qualify for the prospective clients before they meet?

- What training have I provided for my team members to improve their skills?

- What is the average case size for whole group?

- What is the average case size for each of my team members?

- What will I do to increase my case size?

- Which of my unit has the best case size record?

- Which team member/s has/have the best case size record?

- What is the profile of the clients with higher case size?

- How will I move my people to affluent markets?

- Can I get involved in the more sophisticated markets
 - Business Protection
 - Estate Protection
 - Education Funding
 - Retirement Planning
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My Performance Management System

- How will I know my agency members carry out their daily/weekly sales/recruitment activities?

- What will I do to monitor my agency members' performance?

- What is/are the tool/s I use to monitor my agency members' performance?

- How do I apply close activity management?

- What Motivation/Reward/Incentive systems do I have in place?

MY 2020 MAPA PLAN SHEET

1	Agent No.				
2	Name				
3	Rank				
4	Branch				
5	Manpower (Total)	Q1	Q2	Q3	Q4
6	Active Agent	Q1	Q2	Q3	Q4
7	New Recruit	Q1	Q2	Q3	Q4
8	Productivity	Q1	Q2	Q3	Q4
9	Average Case Size	Q1	Q2	Q3	Q4
10	Production (ANP)	Q1	Q2	Q3	Q4
11	# of Next Gen Qualifier				
12	# of SES Qualifier				
13	# of Supremacy Qualifier				
14	# of GSPC Qualifier				
15	# of MDRT Qualifier				
16	Your Vision in 2020				

NOTE:

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