

Tulsa Risk & Insurance Services

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Four Month Plan



vision

In the next four months (Sept - Dec) grow my Tulsa PCS practice into a \$12K/month revenue generating business specializing in personal P&C sales to high net worth individuals.



mission

Create peace of mind through proactive personal risk management.



objectives

- Achieve 2008 sales of \$100,000.
- Work with prospects greater than or equal to \$15K ICP 90% of the time.
- Call 35 prospects by Oct 31st.
- Implement suspect COI strategy w/ 114 suspect COIs in my database 9/1/08 to 1/1/09.
- Produce minimum of \$12K in revenue every month in 2008; target \$150,000.



strategies

- Leverage client and COI relationships for new business referrals to ICP prospects.
- Est. performance team via execution & accountability w/ AEs, Stews, MAA, & Claims.
- Develop suspect COIs w/Continuous Contact COI Strategy Plan (CCCOISP)
- Grow business by asking for & working w/ICP clients.
- Ask every suspect COI for "test case or diagnostic" app w/ their clientele.
- Use direct mail for access to Top 50 prospects and large homes in target market.
- Confirm value and ask for referrals from clients at every meeting.
- Follow up w/ AE and Prospects on open cases weekly.
- Put all suspect COIs thru CCCOISP.



action plans

- Direct mail to large SGV homes by 9/30.
- Client-Confirm Value: ask 4 referrals 2 prospects/COIs.
- Mail letters and f-u by phone to Top 50 by Oct 15th.
- Mail /in-person (CCCOISP) 6 to 7 pre-determined items throughout year based on A,B, or C.
- Dial 114 suspect COIs by Nov 15th.