

**12 POWERFUL
"MINI HABITS"
TO PRACTICE
EACH DAY**

2023 Daily Planner

Volume X - October to December



YOUR 212 COACH
www.your212coach.com

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Action Plans to Achieve Goals

BEFORE Your Day Begins:

- √ Identify "What Would Make Today Great"
- √ Identify YOUR Commission Goal
- √ Identify Two Action Plans to Achieve YOUR Goals

What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am committed to the following activities today:

1.) _____

2.) _____

Notes:



Pivoting

- √ 80% of Your Policyholder Interactions are with PH's who are missing at least one line of insurance with you!
- √ Your Competition is ALREADY inside your PH's Home!
- √ List PH Name, Line You Pivot to and their Current Co.

*I noticed you do not have your (Auto, Fire, Life, Health) with us.....
who may I list as your (Auto, Fire, Life, Health) Insurance Provider?*

<i>Name</i>	<i>Line</i>	<i>Provider</i>
<i>Name</i>	<i>Line</i>	<i>Provider</i>

Notes:



Appointments

- √ Non-demand sales typically come from Appointments
- √ Lapse/Can IMPROVES with Appointments
- √ Note future "Appointments Set Today"
- √ Record names of PH's you had an Appt with today

Appointments Set Today:

Today's Appointments:

Notes:



Life Pivot's

- √ If You Ain't Askin' They Ain't Buyin'
- √ "Who may I list as your Life Insurance Provider?"
- √ List names of People you speak to about Life Insurance
- √ Make a note of the Response or Next Step for Follow-up

<i>My Life Pivots/Asks Today:</i>	<i>Response/Next Steps:</i>
<hr style="border: none; border-top: 1px solid black;"/>	<hr style="border: none; border-top: 1px solid black;"/>

Notes:



Auto Insurance

- √ Record the names of ALL Auto Transactions
- √ C = Change / A = Added / R = Raw New
- √ List the name of the Policyholders' Homeowners of Renters Insurance Company

Autos Written Today:

C/A/R

HOW/Renters Company

Notes:



Fire Insurance

Homes, Renters, Condos, PAF's, PLUP's and CMP
√ Schedule Appointments To DELIVER Home,
Renters and Condo Policies
√ Use Appointment to Pivot to Life/Disability

Fire Policies Written Today:

Date of Delivery Appointment:

Notes:



SIGNificant Events

- ✓ Do they Leave Because of Price or some "Event"
- ✓ Complete SIGNificant Event Forms upon notice
- ✓ Place completed Forms in a "White Glove Folder"
- ✓ Follow-Up with Policyholder BEFORE Premium Notice

I handled the following SIGNificant Events today:

Notes:



"THANK YOU" Calls

- √ Because we don't say it enough and don't always mean it
- √ "How are you" and/or something "personal"
- √ "Thank you"
- √ "What can I be working on for you?"

I called the following people to say "THANK YOU" (original x dates):

Notes:



Quotes, Notes and Items for Follow-Up

- √ People do NOT like to be SOLD, but love to BUY
- √ Record Current Company, Birthdays, Tickets/Accidents
- √ Pend six-months or pend for monthly "review"
- √ "Work" for leads as if they have already hired you

Quotes Given, Notes and Items for Follow-Up from Today:

Notes:



Self-Accountability and Ownership of Results

- √ Hold YOURSELF Accountable for desired results
- √ Record your WINS and acknowledge what YOU could have done DIFFERENTLY to make today BETTER!
- √ Record DAILY Sales Statistics

My WINS from today:

How I could have made today BETTER:

Today's Achievements:

Auto Fire Financial Services

Apps: _____

Premium: _____

Notes:

2

Monday
October



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DAILY PLANNER

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**Thursday
October**



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October



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_____	_____	_____
_____	_____	_____

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Wednesday
October



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**Thursday
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Friday
October



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Monday
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Tuesday
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**Thursday
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Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
who may I list as your (Auto, Fire, Life, Disability) Provider?**

Appointments Set Today:

Today's Appointments:

My Life Pivots/Asks Today:

Autos Written Today:

C/A/R

HOW/Renters Company

Fire Policies Written Today:

Date of Delivery Appointment:

DAILY PLANNER

3

November

I asked the following people for HELP (Referral) or Google Review:

I handled the following SIGNificant Events today:

I called the following people to say "THANK YOU" (original x dates):

Quotes Given, Notes and Items for Follow-Up from Today:

My WINS from today:

How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

6

Monday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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DAILY PLANNER

6

November

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Auto

Fire

Financial Services

Apps:

Premium:

7

Tuesday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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DAILY PLANNER

7

November

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Auto

Fire

Financial Services

Apps:

Premium:

8

Wednesday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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DAILY PLANNER

8

November

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Auto

Fire

Financial Services

Apps:

Premium:

9

Thursday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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DAILY PLANNER

9

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Auto

Fire

Financial Services

Apps:

Premium:

10

Friday

November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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DAILY PLANNER

10

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

13

Monday

November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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DAILY PLANNER

13

November

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How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

14

Tuesday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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DAILY PLANNER

14

November

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My WINS from today:

How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

15

Wednesday
November



What Would Make Today Great? _____

Commission Goal: _____ **Commission Actual:** _____

I am COMMITTED to the following activities today:

1.) _____

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DAILY PLANNER

15

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

16

Thursday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

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C/A/R

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DAILY PLANNER

16

November

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

17

Friday

November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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C/A/R

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DAILY PLANNER

17

November

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

20

Monday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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C/A/R

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DAILY PLANNER

20

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Auto

Fire

Financial Services

Apps:

Premium:

_____	_____	_____
_____	_____	_____

21

Tuesday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

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DAILY PLANNER

21

November

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

22

Wednesday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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DAILY PLANNER

22

November

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How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

23

Thursday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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C/A/R

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DAILY PLANNER

23

November

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How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

24

Friday

November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

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Autos Written Today:

C/A/R

HOW/Renters Company

Fire Policies Written Today:

Date of Delivery Appointment:

DAILY PLANNER

24

November

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My WINS from today:

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

27

Monday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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DAILY PLANNER

27

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

28

Tuesday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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C/A/R

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DAILY PLANNER

28

November

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Auto

Fire

Financial Services

Apps:

Premium:

29

Wednesday
November



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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DAILY PLANNER

29

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Auto

Fire

Financial Services

Apps:

Premium:

30

Thursday
November



What Would Make Today Great? _____

Commission Goal: _____

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DAILY PLANNER

30

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Auto

Fire

Financial Services

Apps:

Premium:

1

Friday
December



What Would Make Today Great? _____

Commission Goal: _____

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DAILY PLANNER

1

December

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Fire

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Premium:

4

Monday
December



What Would Make Today Great? _____

Commission Goal: _____

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DAILY PLANNER

4

December

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Auto

Fire

Financial Services

Apps:

Premium:

5

Tuesday
December



What Would Make Today Great? _____

Commission Goal: _____

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DAILY PLANNER

5

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Auto

Fire

Financial Services

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Premium:

6

Wednesday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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C/A/R

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DAILY PLANNER

6

December

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Auto

Fire

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Premium:

7

Thursday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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DAILY PLANNER

7

December

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Auto

Fire

Financial Services

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Premium:

8

Friday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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DAILY PLANNER

8

December

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Auto

Fire

Financial Services

Apps:

Premium:

11

Monday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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1.) _____

2.) _____

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C/A/R

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DAILY PLANNER

11

December

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Auto

Fire

Financial Services

Apps:

Premium:

12

Tuesday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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C/A/R

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DAILY PLANNER

12

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Auto

Fire

Financial Services

Apps:

Premium:

13

Wednesday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
who may I list as your (Auto, Fire, Life, Disability) Provider?**

Appointments Set Today:

Today's Appointments:

My Life Pivots/Asks Today:

Autos Written Today:

C/A/R

HOW/Renters Company

Fire Policies Written Today:

Date of Delivery Appointment:

DAILY PLANNER

13

December

I asked the following people for HELP (Referral) or Google Review:

I handled the following SIGNificant Events today:

I called the following people to say "THANK YOU" (original x dates):

Quotes Given, Notes and Items for Follow-Up from Today:

My WINS from today:

How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

14

Thursday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
who may I list as your (Auto, Fire, Life, Disability) Provider?**

Appointments Set Today:

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HOW/Renters Company

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DAILY PLANNER

14

December

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My WINS from today:

How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

15

Friday

December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
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DAILY PLANNER

15

December

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How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

18

Monday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

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DAILY PLANNER

18

December

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How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

19

Tuesday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
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DAILY PLANNER

19

December

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My WINS from today:

How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

20

Wednesday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
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DAILY PLANNER

20

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

21

Thursday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
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DAILY PLANNER

21

December

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

22

Friday

December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

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**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
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DAILY PLANNER

22

December

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My WINS from today:

How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

25

Monday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

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HOW/Renters Company

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DAILY PLANNER

25

December

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How I could have made today BETTER:

Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

26

Tuesday
December



What Would Make Today Great? _____

Commission Goal: _____ **Commission Actual:** _____

I am COMMITTED to the following activities today:

1.) _____

2.) _____

**I noticed you do not have your (Auto, Fire, Life, Disability) with us...
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DAILY PLANNER

26

December

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Today's Achievements:

Auto

Fire

Financial Services

Apps:

Premium:

27

Wednesday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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DAILY PLANNER

27

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Auto

Fire

Financial Services

Apps:

Premium:

28

Thursday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

I am COMMITTED to the following activities today:

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DAILY PLANNER

28

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Auto

Fire

Financial Services

Apps:

Premium:

29

Friday
December



What Would Make Today Great? _____

Commission Goal: _____

Commission Actual: _____

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DAILY PLANNER

29

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