



Tips for navigating through your first year as a new insurance producer

1. **Build an aggressive prospecting plan; break it down into daily and weekly activities.** Set specific prospecting activity goals (# of calls to make and # of appointments to set) to build your pipeline; write down your daily and weekly prospecting activity targets and track your activity.
2. **Prospect until it hurts, and then prospect some more.** Make as many calls as you can – keeping a high energy level - and when you're ready to stop, make 10 more calls. Block time for calls – especially early morning and late afternoon when the business owners and CFOs are working and their gatekeepers are not. Be a prospecting animal. Make “warm” calls if you can; make “cold” calls if you must.
3. **Work 50-60 hours per week.** You are a start-up business inside your agency – so commit to working the necessary hours to be a successful entrepreneur. Get in the office early and stay late to do your phone prospecting – but don't be an office potato either.
4. **Take owners and/or experienced producers with you on prospect appointments.** In the beginning, focus on getting the appointment and lean on others after you get a prospect's door opened – listen, learn and let others help you diagnose the opportunity and get the win.
5. **Focus on niches.** Find industries where you want to build a clientele and start becoming a risk management and insurance expert. Find industries where you already know people, where your agency has proven success and that are widely available in your local market. Seek connections, referrals and introductions.
6. **Network.** Tell everybody you know what you do for a living. Be active in local and niche industry networking groups. Network and seek referrals through being active on Linked In.
7. **Be coachable.** Ask experienced producers and agency owners for help – especially about what works and how to handle obstacles that will come up in the insurance sales process. Agency owners/mentors assume you will seek them out when you have questions or need help – do so!
8. **Be engaged with your fellow agency employees.** Build respectful, productive relationships with your inside team. Ask questions. Don't be too proud to admit that you need help. Your agency colleagues will make time for you as they want you to succeed. Communication is critical.
9. **Keep a positive attitude.** Maintain an even keel and keep grinding. Don't get discouraged by the inevitable high level of pain and rejection in the first year. Laugh off rejection. Focus on the right activities - making prospect contacts and setting appointments - and just keep going.
10. **Do all of the little things right.** Be on time or early for sales meetings. Never be late or miss a meeting or appointment of any kind for that matter. Be polite and nice to everybody you encounter. Dress for success – observe how the most successful producers dress and copy them. Limit your personal calls and texting during work hours to the bare minimum.