



# Q\_ INSURANCE 2\_ BUSINESS PLANNING TOOL



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## Q<sub>2</sub>

**EMAIL**

## The Big 3

## PERSONAL

[illegible]

## The Big 3

## PERSONAL

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# Q GOALS

The Big 3

## BUSINESS

## PERSONAL

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## WEEKLY RESULTS GOALS

<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Leads	In-Process	Closed	New Hires				

## WEEKLY ACTIVITY COMMITMENTS

<div></div>	+	<div></div>	=	<div></div>	<div></div>	<div></div>
Lead Calls		Client Calls		Total L & C Calls	Database Calls	Recruit Calls
						Qual. Conv.
<div></div>		<div></div>		<div></div>	<div></div>	<div></div>
Total Live Meetings		Biz Planning Mtg.		Sales Pres.		

## HABITS OF SUCCESS

ON-TIME \_\_\_\_\_ hours/week

SOCIAL \_\_\_\_\_ posts or hours/week

HW NOTES \_\_\_\_\_ /week

SLEEP \_\_\_\_\_ hours/night

EXERCISE \_\_\_\_\_

MORNING ROUTINE \_\_\_\_\_

EVENING ROUTINE \_\_\_\_\_

NEW HABIT \_\_\_\_\_

## CRITICAL RELATIONSHIPS

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[illegible]

PROJECT	PROJECT	PROJECT
Planned Completion Date	Planned Completion Date	Planned Completion Date
Steps	Steps	Steps
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.
Notes	Notes	Notes

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT./SUN.
5 am	5 am	5 am	5 am	5 am	5 am
6 am	6 am	6 am	6 am	6 am	6 am
7 am	7 am	7 am	7 am	7 am	7 am
8 am	8 am	8 am	8 am	8 am	8 am
9 am	9 am	9 am	9 am	9 am	9 am
10 am	10 am	10 am	10 am	10 am	10 am
11 am	11 am	11 am	11 am	11 am	11 am
NOON	NOON	NOON	NOON	NOON	NOON
1 pm	1 pm	1 pm	1 pm	1 pm	1 pm
2 pm	2 pm	2 pm	2 pm	2 pm	2 pm
3 pm	3 pm	3 pm	3 pm	3 pm	3 pm
4 pm	4 pm	4 pm	4 pm	4 pm	4 pm
5 pm	5 pm	5 pm	5 pm	5 pm	5 pm
6 pm	6 pm	6 pm	6 pm	6 pm	6 pm
7 pm	7 pm	7 pm	7 pm	7 pm	7 pm
8 pm	8 pm	8 pm	8 pm	8 pm	8 pm