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# Q\_ INSURANCE

## 2\_ BUSINESS PLANNING TOOL

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For Free Online Tutorial and to Download Next Quarter Visit:

[WWW.WINBYNOON.COM/BUSINESSPLANNINGTOOL](http://WWW.WINBYNOON.COM/BUSINESSPLANNINGTOOL)

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# WINBYNOON® BUSINESS PLANNING TOOL

If found, please return to

Q  
2

NAME

PHONE

EMAIL

## LAST YEAR'S TOTALS

*The Big 3*

BUSINESS

PERSONAL

THOUGHTS / ADJUSTMENTS / CHANGES:

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## GOALS FOR THIS YEAR

*The Big 3*

BUSINESS

PERSONAL



WINBYNOON® BUSINESS PLANNING TOOL

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# Q GOALS

The Big 3

## BUSINESS

## PERSONAL

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## WEEKLY RESULTS GOALS

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Leads	Quotes	Personal Lines	Comm. Lines	X-Dated	Policies Sold		

## WEEKLY ACTIVITY COMMITMENTS

<input type="text"/>	+	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lead Calls		Client Calls		Total L & C Calls	Partner Calls	Qual. Conv.
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
External Live Meetings		Seminars		Policy Reviews		Internal Live Meetings
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>

## 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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PROJECT <input type="checkbox"/>	PROJECT <input type="checkbox"/>	PROJECT <input type="checkbox"/>
<i>Planned Completion Date</i>	<i>Planned Completion Date</i>	<i>Planned Completion Date</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Steps</i>	<i>Steps</i>	<i>Steps</i>
1. <input type="text"/>	1. <input type="text"/>	1. <input type="text"/>
2. <input type="text"/>	2. <input type="text"/>	2. <input type="text"/>
3. <input type="text"/>	3. <input type="text"/>	3. <input type="text"/>
4. <input type="text"/>	4. <input type="text"/>	4. <input type="text"/>
5. <input type="text"/>	5. <input type="text"/>	5. <input type="text"/>
<i>Notes</i>	<i>Notes</i>	<i>Notes</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>

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