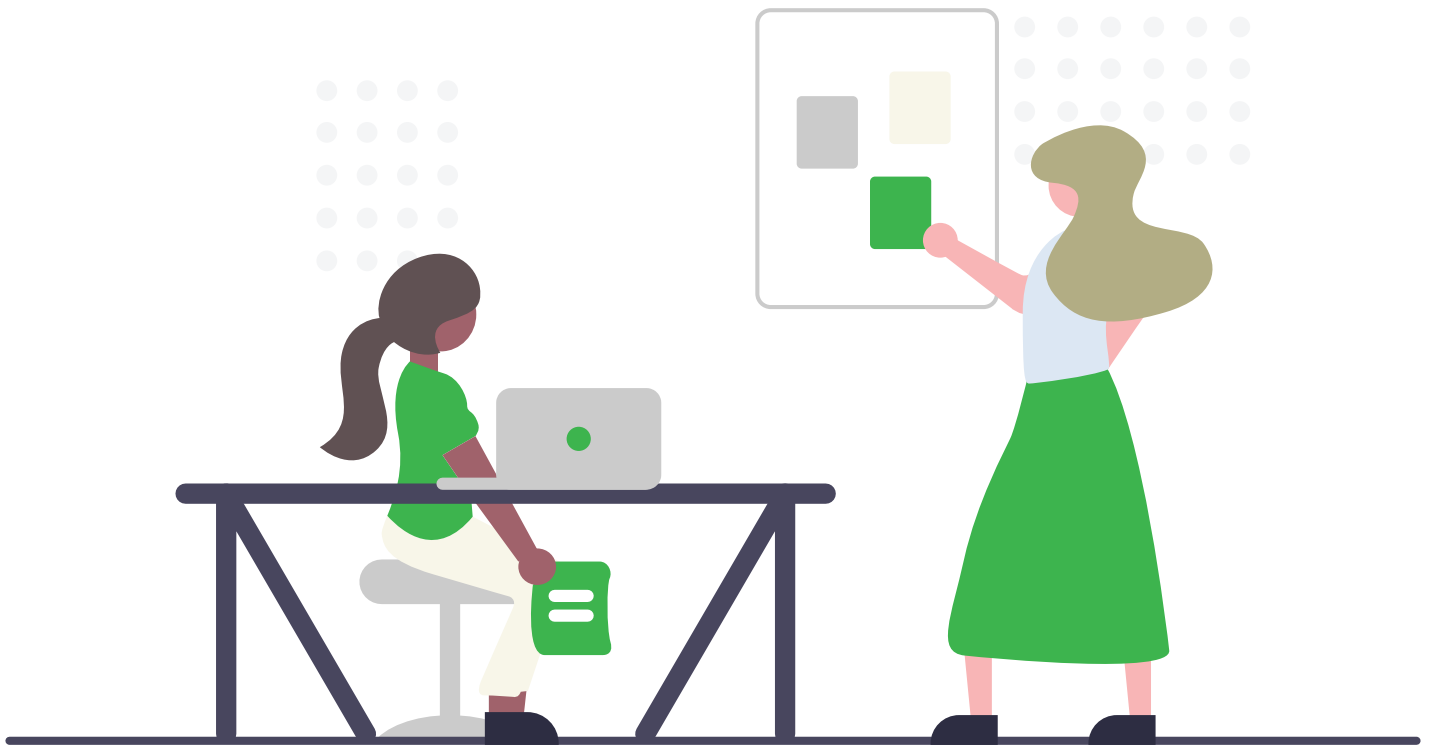




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Target List Resource



You know what they say...

A goal without a plan is just a wish. As a business leader, it's important to implement processes that outline expectations and give your team members the greatest chance at success. This is especially true when trying to close more leads at your agency.

With a target sheet, you can help your team members set tangible goals and follow a proven process for earning more sales. These handy resources require team members to track conversations, list premiums and stay accountable to their targets.

Many agents hand out a new target list on Monday and collect the results on Friday to monitor how their team is doing and offer guidance when needed. With our editable sheets, you can also email the target list to your team and have them return the PDF at the end of the week.

Now say it with us...

we **will** close more leads!

People I **WILL** Close

From your quote tracker, select 5 names you feel like you will close. This list should be contacted every other day by phone or text. Don't forget to include their number and total premium.

Name	Number	Product	Premium

People I Would **LIKE** To Close

From your quote tracker, select 5 names you would like to close.

This list should be contacted every other day by phone or text.

Don't forget to include their number and total premium.

Name	Number	Product	Premium



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