Processes / Ideas For your Staff in the First 6 months of the year

Pull a list of your TOP 25 clients and make sure you have at least 1 face to face or phone call set with one of them a week (Task for someone in your office)

Make sure 1 of these a week are set for you. Nurture these relationships and get referrals. Make sure Policy Reviews / Birthdays / Beneficiary Reviews are constantly looked at on a monthly basis if running low on people to contact (Use CRM system)

Idea I got from one of my advisors: On every call his team has with an existing client, before they get off a phone call with someone or when someone is leaving the office, they make sure they always say “before I let you go, *Agents Name* wants us to know when you talk about us to your friends and family members – how do you describe us?” Make sure you have a quick answer for your client when they counter and ask how should we describe you. This is called, planting the seed. This will increase referrals over time.