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See Differently. Business Differently.

12-Day Turnaround with Chris Jarvis

Day 1 – My Great Ideas

There is no perfect industry, perfect process or perfect product. EVERYTHING can be better in some way—especially this form.

For now, please think about the different elements of your business and the insurance industry. First, rate yourself on how well you do each of the areas.

1 2 3 4 5 6 7 8 9 10

I am awful at this

I'm ok, but could improve

I'm a master!

Note: Please do *yourself* a favor and print these PDFs so you get the most out of them.

How well do you do in the ten (10) main areas of sales?	Score (1 to 10)
1. How easily do you identify new prospects WITHOUT paying for those leads?	
2. How easy is it to get meetings, have meaningful discussions, and collect all pertinent information from these prospects?	
3. How well do you Identify needs (that your clients verbally acknowledge as important) from your intake process?	
4. How well do you find unique and interesting solutions to prospects needs?	
5. How difficult do you find it to create a presentation that clearly points out the benefits, costs, and implementation steps for your solution?	

6. How do you and your clients feel about the time and energy needs to complete the application and underwriting process?	
7. How well do you “close the deal” with new prospects? Your % of cases closed vs. clients pitched should be your score (60%=6, 40% = 4, etc.)	
8. How well do you service your clients? Do you have an administrative person doing this for you? Do you review annually and secure referrals and/or new opportunities?	
9. How well do you secure referrals and receive introductions to them from your clients on a favorable basis?	
10. Identifying new opportunities with existing clients	
TOTAL (out of 100)	
Subtract the number above from 100 (if 80, then 100-80 = 20)	
The number above is your room to grow. 50%, 20%, 90%	

Second, give yourself permission to dream about major improvements and even perceived perfection in each area. Do not worry about criticism or plausibility. Disregard costs of implementation. After each area, write down some ideas you have that would make life better for the clients, the insurance industry, agents, and you! (It’s okay if this is wish list. You must first think about it before it can happen.)

What would make each of these steps so much easier for you?
1. What would help you meet countless new prospects?
2. What do you think you need to get more meetings and collect all pertinent information from prospects so you can do your job better?

3. How could you make better connections with clients and identify their needs faster?
4. What do you need to create and offer interesting and unique solutions?
5. What would make the presentation process more effective? Easier?
6. What would make the application or underwriting process easier? Faster?
7. What would help you close more cases? Close bigger cases?
8. What would make the review and service process easier? Cheaper? Profitable?
9. What would you need to be able to secure referrals and introductions from all clients?
10. What could help you identify new opportunities with all existing clients?