



CHRIS JARVIS

See Differently. Business Differently.

12-Day Turnaround with Chris Jarvis

Day 3 (Part 1) – Practice Assessment Form

(Please download/ and open the attached spreadsheet, so the formulas will work for your numbers.)

We can't help you assess how best to improve your career until we know what you do, how well you do it, and whom you are doing it for in your current model.

The workbook below has two worksheets. The first one is a summary sheet. The second is a more detailed income sheet that breaks down your income by product and by the number of clients you sold.

The other side of this analysis is to figure out how much time you are wasting on inefficient marketing, selling to people who don't buy, and unproductive overhead. All of that will be available later for those who want to invest in further analysis to improve that side of the ledger.

For, now please start with the second tab, "Income." Input how many sales you have had in each category (for each of the last three years). If you were not in the business in a previous year, or you didn't sell a certain line of coverage, just leave it blank.

You will also input how much you earned from each category in each year. Once you do this, you will have an idea of your average case size by product for each of the last few years.

What do you notice? Are the sizes and numbers of your cases steadily growing in each category or are the numbers bouncing around all over the place from year to year?

What do you notice and how do you explain the shifts? Is this luck or part of a master plan that is coming along nicely? Is it proof that you have been willing to write anything that you can without any focus or niche?

Use the space below to write down what you notice about your business, how you explain it, and what you would like to see change for 2018 and 2019?

Observations about My Income Assessment
1. How has your mix of business (products sold) changed from 2015 to 2017? Why?
2. Are you selling more or fewer total policies each year? Why has this changed?
3. Is your average case size staying the same or getting bigger or smaller? Why?
4. What new lines of business have you added? Why did you add them?
5. How much time have you spent on these new products? Is it worth the time?
6. Are you working less or more than before? Making less, more the same? Why?
7. What are your goals for income and policies for 2018? 2019? 2020?

8. Are you on track to meet these goals?

9. What do you need most (up to 3 things) to help you reach your goals ?

10. What is the biggest threat that could derail you from meeting your goals?