

Seen Call Dollar System

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Overview of Personal Tracking System



GOLDENCARE
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Business Consultant Questions

- What is your primary market?
- What kind of traffic do you get each day?
- OK, what is your average daily sales?
- OK, can I look at your books?
- OK, can I look at your checkbook?

Tracking System Problems

- Almost all rely on “fake numbers”
- Example:
 - 25 appts a week – 15 presentations = 5 sales
 - Doesn't allow for personal strengths

Seen Call Dollar System

- First one I saw that was based on my numbers
- Most accurate method of tracking personal sales
- Using this method you can project personal income through the year accurately
- Gives you daily personal goal that will work through slumps, market changes, etc.

You Are A Business

PLAN LIKE A BUSINESS

- Long-Term Planning
- Mid-Term Planning
- Short-Term Planning

INVEST LIKE A BUSINESS

- Education
- Equipment

Qwik-Start Course

INTRODUCTION

The Weekly Planner and the Suitability Form is designed to help you succeed in insurance. However, it also gives critical information to the sales department in allowing them to:

- Track the success of the agent;
- Spot potential problems that the District Manager can help the agent overcome;
- Track the success of the leads generation program as a whole;
- Allow them to track the success of various types of leads generated for the agents.

The value to both the agent and the company dictates the importance of the following rules. Please be aware that this is not an option! You will be expected, indeed required, to follow the guidelines below in an ethical manner.

On the following pages you will see a description of the various terms used in the planning process, sample completed forms, and quarterly reports for your personal records.

The "Seen Call"

SEEN CALL OR TALKED TO

A seen call, or a "talked to", is any attempt to set an appointment with a person or couple. This may include a telephone approach, cold call, or a "chance" meeting. ANY attempt to "sell" the appointment should be considered a seen call. Every time you talk with a prospect, it is considered a seen call. This means that one lead card could generate numerous seen calls.

Tracking your Seen Calls is critical to your future. Knowing the ratio from your seen calls will allow you to plan your future with a degree of accuracy.

- Keeping track of seen calls is the **single most important key to success in the insurance field.**
- Successful insurance agents in the field today use this method of tracking their ability in the field.
- Failure in tracking seen calls is the first sign to the District Manager that the agent is not committed to being successful.

Seen Call Numbers

Seen Call Value

The "Seen Call Value" is calculated by dividing the total commission dollars by the number of seen calls in a time frame. The motivation factor is the key here. Once your seen call dollar value is established, you can plan your income better, get through sales slumps easier, and not ride the roller coaster ride the average agent does in insurance today.

Sale Ratio

The "Sale Ratio" is calculated by dividing the number of seen calls by the number of applications sold. This ratio is primarily for advanced planning purposes.

Appointment Ratio

The "Appointment Ratio" is calculated by dividing the number of seen calls by the number of appointments. This, too, is primarily for advanced planning purposes.

Appointment Numbers

APPOINTMENT

An "appointment" is any meeting with a prospect in which the sales process begins. While this sounds vague, the key here is consistency. If you always use the same point in the process, your numbers will be accurate.

Appointment Value

The "Appointment Value" is calculated by dividing the total commission dollars by the total number of appointments in a time frame. This is primarily for planning purposes.

Sale Ratio

The "Sale Ratio" is calculated by dividing the total number of applications written by the total number of appointments in a time frame. This is for planning purposes also.

Quarterly Report

SAMPLE QUARTERLY REPORT

Week	Seen		LTC			Other			Total
Ending	Calls	Appt.	Apps	Premium	Comm	Apps	Premium	Comm	Comm
Totals	640	195	25	41200	16480	15	5145	1801	18281
Week Ave.	49.23	15.00	1.92	3169.23	1267.69	1.15	395.77	138.54	1406.23

Seen Calls

Value	\$28.56
Sale Ratio	16.00
Appt. Ratio	3.28

Appointments

Value	\$93.75
Sale Ratio	20.51
Ave. Per Wk	15.00

Analyzing Data

- Comparing against yourself
 - 20 years of experience or 1 year 20 times?
- Marketing, Presentations and Techniques
 - Know whether your changes work, don't guess
- Comparing against others

The Real Purpose Of System

SETTING YOUR INCOME GOALS

The main purpose of using this system is to allow you to set and accomplish your income goals. The following steps are used to determine the activity needed to make your goal.

GOAL: Make \$50,000 first year commission.

Step 1

Factor placement percentage into Seen Call dollar value.

Formula: SC Value times Placement Percentage

Example: $\$28.56 \times 80\% = \22.85

- First, have to make the numbers accurate for you in regards to placement

Determine Seen Calls Needed

Step 2

Determine the number of Seen Calls needed to reach income goal.

Formula: Income Goal divided by the Result of Step One.

Example: $\$50,000 / \$22.85 = 2188$

Step 3

Determine the number of seen calls needed per week to reach income goal.

Formula: Result of Step Two divided to

$$2188 / 50 = 44$$

- Allows you to take days off
- Allows you to schedule vacations
- You know you'll still reach your goals!

Make The Numbers Your Numbers

Step 4

Enter your numbers onto the Quarterly Planning Report for the next 13 weeks. Calculate your own Seen Call dollar value and find your placement percentage. Repeat the above steps to make the numbers accurate to your selling skills.

- Key to whole system is right here
- You're not guessing, you're using your data

Reach Your Highest Potential

- Remember that you are a business
- Accept responsibility!
 - The fact that you are exactly where you want to be at this point in your life
 - The fact that no one has any control over your life
- The only person that controls you is the person in the mirror
- Learn to set goals and track them



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Thanks for attending,

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