

Agency Manager Personal Analysis Questionnaire

Your Name: _____ **Date mailed to us:** _____

Your E-Mail address: _____

You can open this form in your word program or online browser and click on the enable editing mode and then fill in the required information. Once completed, then save and e-mail it to me when completed.

Fill out all the information as best as you can. The more information we have, the easier it will be for us to determine if we can actually help you.

The main purpose of this questionnaire is for the both of us to determine if my services are compatible to your current situation, which is to help you build a life insurance agency. Because of the enormous amount of time required by my staff and our insurance career learning center, it is vital that we have a win-win concept. We do not want to take on situations that may not have the needed requirements to become successful.

This questionnaire will help us take a close look at what your situation is at this moment in time, and if for some reason it is not compatible to our minimum requirements, we will let you know and tell you what needs to be done to posture yourself properly to build an agency at a later date.

Once we review this questionnaire and if we feel you are postured properly, we will then ask you to go back to the Insurance career learning center page and enroll in the agency building and recruiting program. At that point we will start brainstorming some ideas and start our one on one mentoring process. Of course, any success will be dependent on you. We can only help you create a system and a an action plan. It is up to you to implement it.

Once completed, send this **Personal Analysis Questionnaire** to the e-mail below

insurance.learning.center@gmail.com

You may also e-mail any questions about any of the questions on this form to this same e-mail address:

insurance.learning.center@gmail.com

Before you start recruiting anyone, there will be several things that need to be done.

- Making sure we have the right contracts to recruit too.
- Create a solid recruiting presentation.
- Develop an in house new agent “welcome on board training” manual.
- Make sure we have some company recruiting pieces.
- Understand that we will need to have a visit with prospective new agents spouse.
- Learning and understanding the recruiting process.
- We must also have the proper mindset.

- Understanding the recruiting system and philosophy of who we want to recruit.

Agency Manager Personal Analysis Questionnaire

Complete The Personal Analysis Form Shown Below

Our goal is to work with you on a one on one basis, to help walk you through each process. We will keep you informed of the time left during our one on one sessions.

Our hourly time not only includes one on meetings and mailings, but any actual documentation or forms we make up for you.

We will send you information to read, send you videos to look at, possibly role play your recruiting talk and any other help as the situation dictates.

Recruiting and building an agency is not a get rich quick scheme. You must be able to lead from the front, develop win-win concepts, be available at all hours of the day as each situation dictates.

What we want to do is complete the below questionnaire. Feel free to bring up any and all areas of concerns.

First of all we would like you to provide us with some personal and then some business information. Everything you share with us is held in the strictest of confidence. No one else will ever know or see what you say.

Please feel free to type up and include any additional pages if you do not have enough room to answer on our form. Just refer to the item number such as Item C or Item H, etc.

Tell us on a separate sheet what it is that you want to achieve and what you feel would be the most important area we should start working on to help you start building and recruiting your agency. Try to be as specific as possible. Tell us what your number one objective would be and then number 2, number 3 and what immediate areas you want help in.

Please provide us with the following information so we can better evaluate where you are at this time.

Personal information:

What is your age: _____ Are you married? _____ Any Children: _____

Does your spouse work? _____ Type of work. _____

City: _____ State: _____ Country: _____

What did you do before you started in the insurance business? _____

Have you approached any of your friends or old business acquaintances yet? _____

Does your spouse support you in your insurance career? On scale of 0 to 10 _____ (10 being great)

Agency Manager Personal Analysis Questionnaire

Tell us what your biggest surprise has been or was since you started in the insurance business?

Insurance selling information:

A: how long have you been in the insurance business? _____

How many companies have you been with so far? _____

What was your reason for changing companies?

How were you recruited into the business? _____

What was your first product or target market that you learned to sell?

B: Tell us about the type of product you are currently specializing in, or what products are you currently selling.

Type of product: _____ (term, Universal life, annuity's, variable insurance products.)

Do you specialize in one type of product or concept?

C: What was your income last year? over \$40,000 ___ over \$60,000 ___ over \$80,000 ___ over \$100,000 ___

D: What is the name of your current insurance company?

E: Is your current contract a captive agent contract? ___ or a broker contract ___?

If you are a captive agent, does your company have agency building contracts for different levels?

F: What type of 1st year commission schedule are you personally on? ___% contract other ___

Does your current company have a tiered contract situation? Yes ___ No ___ Not sure ___

As an example: does it allow you to have agents receive overrides on each one of these levels? Can an agent that would have a 75% contract, hire someone under them at a 55% contract and be able to receive the 20% difference as an override.

Agency Manager Personal Analysis Questionnaire

G: Does your current insurance contract provide you with renewals? Yes ___ No ___

H: Do you currently have a target market and if so what would it be?

Tell us about the type of product of your specializing in or what products you are you currently selling.

Do you have a specialized product that you could teach a new person to sell?

Or would you feel better working in another type of target market to build and recruit to?

I: Tell us briefly about the community that you live in in the surrounding communities and the approximate population base.

J: Give us an idea of what your population base looks like and what your target market might consist of. As an example, blue collar workers, professionals, agriculture, military, civil service or otherwise.

K: What type of insurance selling and marketing schooling have you had so far?

What type of schooling do you think you would be of the most benefit to you right at this moment in time...

L: Where would you say your attitude is at this moment in time? On a scale of 0 to 10, with 10 being best. _____

M: How do you prospect? Where do you generate names/ leads from? _____

N: How do you feel about making phone calls? _____

Agency Manager Personal Analysis Questionnaire

O: How many hours a day do your work? ____ What is your schedule like? _____

Do you work evenings? _____ Do you work weekends? _____

What percentage of appointments is daytime? _____ % What percentage are evening appointments? _____%

P: Do you have any type of record keeping system? ____ Tell me what it entails? _____

How many call/contacts does it take for you to get an interview? _____

How many interviews does it take for you to make a sale? _____

What is your average commission per sale? \$ _____

Q: Do you use any type of referred lead talk? _____ If so how satisfied are with results? _____

R: Did your or does your agency manager currently do personal sales? ____ If so what is his/her market?

Does your agency manager have weekly meetings? _____ Does he/she have any training meetings? _____

S: When you first started out, were you making good money right away? _____

T: Why do you think you can be a good recruiter?

U: Provide us with a brief summary on what your thoughts on regarding building an agency, How do you think you would go about doing this and what you feel might be an appropriate target market to sell to?

V: What size agency are you looking at building and the many agents are you thinking about hiring based on your current population and target market?

Type your name here: _____

Completed, Signed and dated: _____

Agency Manager Personal Analysis Questionnaire

Additional Comments, thoughts: