

AGENT MEETING CHECKLIST

“Leadership is developed...because the leader begins to influence people with relationship, not just position. Building relationships develops a foundation for effectively leading others. It also starts to breakdown organizational silos as people connect.” - John Maxwell, 5 Levels of Leadership

MANAGER OVERVIEW

Check-In & Care for the Agent

- Start with your relationship
- Connect personally

Review Activity & Results

- Weekly activity sheet and monthly report
- What are the numbers saying?

Discuss Challenges

- Work-related
- Personal challenges

Discus Opportunities

- Growth opportunities
- Performance opportunities

Set Goals

- Review personal finance goals
- Discuss company goals and expectations: performance, PPL, etc.

Develop a Plan of Action

- Determine actionable steps for the week

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GUIDELINES TO FOLLOW

Have the Right Attitude Toward People

- How much do you like people and how much do they like you?

Connect with Yourself

- Self-awareness
- Self-improvement
- Self-image
- Self-responsibility
- Self-honesty

Understand Where **YOU** Are Coming From

- Relationships & Results - “Win at Both”

Express Value for This Person

Evaluate Where You Are with This Individual

Accept this Whole Person as a Part of Your Leading

- The Messy and the Good

Become This Person’s Encourager-in-Chief

Practice Both Care and Candor

- If you *care* about people, you will want to be *honest* with them in a way that helps them. Address tough issues and mistakes immediately but with *care* and *candor*. Remember the golden rule!

AGENT MEETING DEBRIEF

Agent Name: _____

Leader Name: _____

Date: _____

Check-in & Agent Care

Activity & Results

Challenges

Opportunities

Goals

Plan of Action
