Development Plan for Agent Gavin Yates

Below is the individual data for Agent Gavin Yates.

You need to analyze the data and create your diagnostic to list the strengths, development needs, and the recommended solutions for your agents in the space provided in the next page.

Agent profile

Gavin is 41. He has had several careers in the past and has a small level of savings. He is looking to pay the bills and send money to his family but isn't overly motivated to earn big money. Clients like this agent as they see him as honest and not a typical pushy salesperson. His experience in other jobs makes him a good conversationalist and the other agents like to hear his stories. His worst trait is that he is cynical and closed to feedback and new ideas, he believes he knows everything, and doesn't believe in being told what he should do.

Acronyms used in the Activity Data

NC	New Contacts (Phone Calls)
FA	First Appointments (Fact Finder Meeting)
CA	Closing Appointment (Solution Presentation)
Meet	Meetings
Tot Meet	Total Meetings (FA + CA)

Apps	Application
Tot Apps	Total Applications (Life + A&H)
Ref	Referrals
R1	Number of Calls
R2	Number of FA (Fact F) to CA (Solutions)
R3	Number of CA to Sales (Applications)
R4	Number of Ref per Total Meetings

Agent Data

R1	R2	R3	R4

Agent	New Contacts (NC)	First Appointment (FA)	Closing Appointment (CA)	Total Meetings	Life	PA	Total Apps	Referrals
Gavin Yates	425	42	11	53	2	3	5	81

NC/FA	FA/CA	CA to Tot Apps	Ref per Tot Meet
10.12	3.82	2.20	1.53

NC/Day	FA/Day	Tot Meet/Day	Ref/Day	Agents Productivity/Month (L and A&H)	Total Apps
1.65	0.16	0.21	0.31	0.42	5.00

LIMRA Recommendation			
R1	R2	R3	R4
NC/FF	FA/CA	CA/Sale	Ref/Tot Meet
5 to 1	2 to 1	2 to 1	5 to 1

LIMRA Recommendation		
New Calls	FF/Day	Ref/Meet
10	2	10

MetLife

Your diagnosis basis the data provided for Gavin

Agent's strengths

Opportunity for development

Solutions you want to explore