

Name of Manager:		Name of Director:					
Representative Code:		Date:			Branch:		
<b>REVIEW OF ACTIVITIES</b>		<b>Team Results</b>			<b>Personal Results</b>		
		<b>Target Set</b>	<b>In the Pipeline</b>	<b>Target Achieved</b>	<b>Target Set</b>	<b>In the Pipeline</b>	<b>Target Achieved</b>
<b>Production</b>	GR/APE						
	Active Adviser Ratio				NA		
<b>Recruitment (Recruits Contracted)</b>	New Adviser	NA					
	Experienced Adviser						

### Suggested Topics for Discussion

- Recruiting Activity & Result
- Weekly Recruiting Activities
- Sources of Recruits
- Recruiting Interviews
- Review JFW with Adviser
- Checking of Adviser's Sales Activities
- New Adviser's weekly review
- Adviser's Development
- Conservation / Persistency
- Complaints/Commendations
- Production / Conference / MDRT Qualifiers
- Recruitment, Retention & BSC Issues

### **Suggested Agenda**

- Begin by reviewing activity.
- Review previous meeting notes
- What went well? What went not so well?
- What issues or areas should we address?
- How should we address them (action plans)?
- How to improve on overall sales advisory services, with added focus in areas of infractions committed?

Please elaborate:

Manager's  
Signature/Date:

Director's Signature/Date:

Date of Next Session:

**Important:** By signing off the above, Supervisor has declared that he/she has personally met and coached the Adviser, all information is final as discussed and agreed by both parties.