

Double Digit SUCCESS

How did they get to this point?

by Jeff Muniz

Central Region Vice President of Agency **Kevin Thompson** should use exclamation points for his region's sales numbers this year over last:

Home up 30 percent!

Auto up 21 percent!

Financial credits up 24 percent!

Instead, Thompson punctuates his numbers with a period, as in Periodization.

"I attribute a lot of our results to Periodization or the ability to focus on what matters day in and day out, and not getting distracted by the many other duties."

It works ... period

Late last year, Thompson began training his agency managers followed by nearly 350 financial representatives this spring in a pilot commitment and accountability program called Periodization.

Representative **Julie Benitez** of the Greater Milwaukee Agency said "I like the concept of breaking down sales goals in 12-week periods versus looking at the whole year."

"You can look at our organization's yearly benchmarks and go whoa, how can I do that? Periodization makes it a lot less over-



whelming," added **Tammy Hanson**, Associate Manager, Northern Lights Agency (N.D.).

Agency force members in the Central Region schedule daily duties and score themselves weekly on how well they followed their game plan. They chart their progress towards their 12-week activity/sales goals using a computer program.

"The program helps representatives own their goals and hold themselves accountable. They should ask themselves, 'Am I making calls, setting appointments, running reviews and going through our sales process?'" Thompson said.

Daily goals lead to yearly success

Each morning Fox Valley (Wis.) Agency Manager **Scott Stanich** huddles over the phone with three other managers where they discuss their goals for the day. It's another

way to encourage accountability while creating a teamwork attitude to share ideas. Stanich says he sees similar interaction with his representatives.

"The use of Periodization has so many people focused on their goals. We have four or five representatives on track to make All American. By far, it's the most we've ever had," Stanich said.

Extra Periodization points for REPRESENTATIVES

- Daily huddles typically last less than five minutes
- Retention has nearly doubled in Central Region
- Use in personal life to improve time management/balance and to set goals