

SMART GOAL SETTING

For Insurance Agents

**A SELF-STUDY ACADEMY COURSE
& WORKBOOK FOR SUCCESS**

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“Desire is the key to motivation, but it’s determination and commitment to an unrelenting pursuit of your goal – a commitment to excellence – that will enable you to attain the success you seek.”

– Mario Andretti

If you were to ask some of the most successful insurance agents what sets them apart; you may not believe their answer to be so simple. The insurance agent who sets effective goals and follows through with achievement can easily understand how success is obtained.

Setting achievable goals is something a lot of people fail to do. It’s great to think about goals in a long-term aspect, but it’s more effective to set goals that you truly believe you can achieve. When you set goals that are attainable, it can advance many areas of your life: time management, leadership skills, problem solving, stress management, and personal self-confidence.

Goal setting is a powerful process that gets you thinking about your ideal future. Creating attainable goals is great for motivating yourself to turn your vision of the future into a reality. The process of goal setting helps you to choose the paths you want to take in life. By knowing precisely what you want to achieve, you can figure out where you should be focusing your efforts.

Setting goals gives you the overall perspective that shapes all other aspects of your life and decision making. Each goal you set can have a huge impact on another area of your life. Spend some time brainstorming and try using some of these top categories for developing goals that best reflect what you want to achieve:

Career - Where do you see yourself in 5 years? What would you like to achieve by then? Maybe a promotion within your company? Or expand your current product line? Ask yourself questions like these to get a feel for some of the goals you should be setting for your career.

Financial - How much would you ideally like to earn this year? How much would you like to earn 5 years from now? Do these financial goals relate to your career goals?

Education - Are there new skillsets you could learn to aid in advancing your career goals?

Family - Are you spending enough time at home? Are you able to balance your home life and your work life? Do you feel as though you would like to see you children/grandchildren more?

Attitude - Is there any part of your mindset that is holding you back from achieving goals or succeeding with new endeavors? (i.e., critical thinking, perfectionistic behaviors, low-self esteem or lack of confidence, etc.)

Physical - Are there goals you wish to achieve regarding your health and wellness? (i.e., drinking more water, stop smoking, exercise more, eat healthier, etc.)

Pleasure- How do you want to enjoy yourself? It's important to make time and care for yourself. Are you looking forward to qualifying for an incentive trip because you are in much need of a getaway? Perhaps you're interested in picking up a new hobby for pleasure, like drawing.

Now it's time to prioritize the goals you have identified in the previous categories. You can begin by creating a one-year plan, six-month plan, or even a one-month plan of smaller goals.

Okay, that seemed easy enough! But now what? Try creating a daily to-do list of tasks each day that can help you work in the direction of achieving some or one of your goals. At an early stage, your smaller goals might be to sit down with your family for dinner at least three times a week, or to simply read a book. When you complete one or just a few of the goals you have set, this will help improve the quality and realism of your goal setting. Using a daily to-do list is an essential piece to achieving your goals, according to some of the most successful insurance agents.

Additionally, there are a few broad guidelines obtained from successful insurance agents to help you in setting effective, achievable goals, such as:

- State each goal as a positive statement.
- Set precise goals , putting in dates, times and amounts to ensure you can measure your achievement.
- Give each of your goals a priority number and work them according to it.
- Keep operational goals small.
- Set performance goals, not outcome goals.
- If you achieve you goals too easily, make you next round of goals harder!
- If the goal took was a bit lengthy, try making the next one a bit easier.
- If you learned something that would lead you to change other goals, do so.
- If you noticed a deficit in your skills despite achieving the goal, decide whether or not to set goals to correct this.

It's important to remember to set both personal and professional goals (sometimes they overlap) that motivate you. This ensures that they are important to you and there is value in achieving them.

Goal achievements require commitment, and maintaining a "sense of urgency" attitude or mind-frame is particularly important. When you don't, you run the risk of finding yourself procrastinating. Procrastination can leave you feeling disappointed or guilty, because you haven't attained your goals.

A good idea to try when setting your goals is to write down why those goals are important and valuable to you. "SMART goals" is a well-known rule to use for goal setting. There are many variations of SMART goal setting, but the standard essence is: **S**pecific, **M**easurable, **A**ttainable, **R**elevant, and **T**ime Bound.

Specific- Your goals must be clear and well defined. When you are vague or use generalizations, it's difficult to find direction in which you will need to attain your goals.

Measurable- Include amounts you want to earn, dates of achievement, etc. in order to actually measure your degree of success.

Attainable- Simply put, make sure that your goals are possible to achieve. Doing otherwise will only erode your confidence and leave you feeling unable to achieve anything.

Relevant- Goals should be relevant to the direction in which you want your personal and professional life to take.

Time Bound- Deadlines are a must. This reminds you when you can celebrate success and increases your motivation to achieve your goal.

Remember, goal setting is an on-going activity to ensure success. It's a never-ending process until you reach the original destination you have set for yourself.

Individual Agent Goal Setting Worksheet

Goal #1 _____

Describe your goal in specific detail:

Who/What will be involved to help you achieve this goal?

How attainable is this goal?

How will you measure your success?

What is the deadline of completion?

Individual Agent Goal Setting Worksheet

Goal #2 _____

Describe your goal in specific detail:

Who/What will be involved to help you achieve this goal?

How attainable is this goal?

How will you measure your success?

What is the deadline of completion?

Individual Agent Goal Setting Worksheet

Goal #3 _____

Describe your goal in specific detail:

Who/What will be involved to help you achieve this goal?

How attainable is this goal?

How will you measure your success?

What is the deadline of completion?

Individual Agent Goal Setting Worksheet

Goal #4 _____

Describe your goal in specific detail:

Who/What will be involved to help you achieve this goal?

How attainable is this goal?

How will you measure your success?

What is the deadline of completion?

Individual Agent Goal Setting Worksheet

Goal #5 _____

Describe your goal in specific detail:

Who/What will be involved to help you achieve this goal?

How attainable is this goal?

How will you measure your success?

What is the deadline of completion?

Congratulations! You should feel very proud of yourself for taking time to learn more about successful goal setting following the S.M.A.R.T. method. We hope this e-book and the content you've found inside deepened your understanding of how to set specific, measurable, attainable, relevant, and time-bound goals



We also want to remind you that if you should ever need further assistance with business consultations, portfolio expansion opportunities, or marketing guidance, don't hesitate to contact us!

Agent Pipeline is here to guide you and empower you to achieve a higher-level of success. You can contact us at 800-962-4693, or visit our Agent Empowerment Tools to learn more about how to build your business. We thank you for your partnership!

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