

Time Management Tips **Agent Pipeline** for Insurance Agents

AN INTEGRITY COMPANY

Tip #1: Start Early

Haven't you ever heard, "The early bird get the worm?" It's true. To increase your productivity, start your day early. Did you know that most successful people arise between 5:00 am and 5:30 am? In fact, in many interviews of successful people, they all have one thing in common: they get their day started early.

It's suggested that a few minutes of quiet reflection time before getting your day started helps you remain focused on your tasks. When you wake up early and start your day in advance, you will find that you are much more clear-headed, creative, and forward-thinking throughout your day.

Waking up early allows you to review your appointments and perhaps start the preparation process for product recommendations. You will immediately feel positive and confident in your ability to accomplish more.

Starting your day early also gives you a head start on the competition. Benjamin Franklin said, "Early to bed and early to rise makes a man healthy, wealthy, and wise."

Tip #2: Prepare in Advance

Preparation is vital to improving your productivity and organizational skills. Prepare your to-do list for tomorrow's workload tonight! The best practice is to plan your entire next day as the last thing you do before coming home from work.

Studies have shown that when you plan your day the night before, while you sleep, your subconscious begins planning and setting goals. You will often wake up with ideas and insights to apply to your projects. An additional benefit in preparing your to-do list the night before is that this lets you sleep more soundly.

Another idea is to pre-plan your client appointments for the next day. Create folders with previous client information and benefits information for review; add new marketing materials or product information for your recommendations. It is a great way to prepare for your meetings and ensure you have all the items necessary for a successful appointment and sale.



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Tip #3: Schedule Your Time

Timing is everything, and scheduling your time reduces stress! The very act of using your organizational skills to plan your day, week, and month gives you the feeling of having control. This feeling of accomplishment and management will help to increase your productivity throughout the day and provide you with self-esteem and a sense of personal power. You will inevitably feel in charge of your life.

Studies show that those who feel confident in their ability to execute the tasks excel more at performing their tasks. It removes the easy fall into procrastination or the sense of the job being less critical. Consider setting blocks of time each day or specific times per week to handle the following:

- Customer service issues
- Marketing strategies
- Setting appointments
- Education/training
- Time with your family

When you are scheduling your time, your busy schedule seems less unmanageable. It's also essential to remember scheduling time for yourself and your family.

Tip #4: Use Prime Time to Your Advantage

Everyone has an "internal prime time." This is the time in which you feel your best, most creative, alert, and productive, according to your body clock. This time is during the evening for some people, and for others, it's mid-day.

Some individuals find their prime time is during the early morning hours. Whatever time is your internal prime time, it's important to schedule work on your most important projects during this time. This will help increase productivity as you will be at your very best: alert, rested, creative, and focused.



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Tip #5: Stay Organized

Do you have a filing system? Do you have trouble finding misplaced items on a shelf or your desk? As many as 30% of professionals say they spend time looking for lost items.

Does this sound familiar to you? The best and most simple filing system is an alphabetical system. We also recommend that you have a master list of records of all of your files in a single place. If you are storing files on your computer, always back up those files or keep paper copies in a secure location. When dealing with PI or PHI information, ensure you have a lock and key to prevent any breaches of confidentiality.

Create specific folders or drawers (if you use a filing cabinet) and label them accordingly. Some ideas for keeping important information is to group based on need. The most important files would be your client files; it is ideal for keeping them together and in alphabetical order. Next? Product information and guides! You could also add marketing materials near each product to ensure you don't lose the brochure for the latest final expense product.

If this sounds overwhelming, the good idea is to spend at least one day thoroughly organizing your office. Take the loose papers lying around and file them accordingly. Set up specific drawers folders and label them clearly. Don't depend on memory to direct you in the way of the marketing brochures or the compliance information.

When you are organized, it's easy to become more productive and efficient. Remaining organized takes a lot of practice. Once you see the benefits of an organized day, you will see the best version of yourself; feeling more confident and executing more sales and marketing strategies.

