



WHAT'S YOUR STORY... *and how can we help?*

(Please answer these questions either in point form on a separate page, or by inserting your answers into this word document.)

1. When and where did you start in the business?
2. What kind of sales training have you had?
3. What kind of industry education have you had?
4. Why are you in business? What's your primary motivation?
5. What is your business focus – your primary product or solution?
6. Who is your MGA/AGA? Why them?
7. Where have you been getting your business and practice management advice up until now?
8. What 3 key changes to their financial situation do you promote to your prospects and clients?
9. How much staff so you have? What do they do?
10. Who is your primary Market? Why these people?
11. How many Clients do you have today? How many do you want to have and by when?
12. What is your sales approach to your market? Can you write out the steps in point form?
13. How do you get your leads and how many are you working on right now?
14. How much revenue did you earn in the last tax year? In the last 12 months?
15. Do you qualify for MDRT, COT, or TOT? Do you attend annual meetings?
16. What is your income target for next year? Five years from now? Ten Years?
17. What kind of business do you want to have in 10 years?



18. How much life insurance premium do you pay each year? What's the face amount?
19. Do you own sufficient Business Overhead Expense and Personal Disability Insurance?
20. How many weeks do you work each year?
21. What do you do for vacation?
22. How many hours do you work each day?
23. How many sales do you plan to make each year?
24. How many meetings do you have each week?
25. Are you part of a Study Group? With whom?
26. What's your biggest strength or talent?
27. What's holding you back from being your best?
28. What 3 changes do you want to make in your business in the short term?
29. What's the one result that would make coaching worthwhile?
30. Is there anything else you want me to know?