

Action Plan

Primary Goal:

Clearly and concisely state the main objective you want to achieve.

Example: Become a top-performing sales agent within the first six months.

Success Metrics:

How will you measure the achievement of your goal? Be specific and quantifiable.

1. **Example:** Consistently exceed monthly sales quotas by 10% or more.
2. **Example:** Achieve a 95% or higher customer satisfaction rating.
3. **Example:** Generate 20 new qualified leads per month through networking.

Potential Risks & Mitigation:

What potential obstacles could get in the way? How will you address them?

- **Risk:** Market becomes more saturated with new agents.
 - **Mitigation:** Focus on building a strong personal brand and unique value proposition. Develop deep expertise in a niche product area.
- **Risk:** Difficulty in generating enough high-quality leads.
 - **Mitigation:** Diversify lead generation strategies (e.g., community events, online marketing, professional networking).

Action Items

Task / Action Step	Owner(s)	Priority	Start Date	Due Date	Status	Notes / Resources Needed
Example: Complete all new-hire training modules.	Brandon Brunson	High	07/07/2025	07/21/2025	<input type="checkbox"/> Not Started	Access to company training portal.
Example: Shadow 3 senior sales	Brandon Brunson	High	07/22/2025	08/01/2025	<input type="checkbox"/> Not Started	Coordinate schedule with sales manager.

agents on client calls.						
Example: Develop a personal sales script and have it reviewed.	Brandon Brunson	Medium	08/04/2025	08/08/2025	<input type="checkbox"/> Not Started	
Example: Set up professional profiles on 3 networking sites.	Brandon Brunson	Medium	07/15/2025	07/18/2025	<input type="checkbox"/> In Progress	Use LinkedIn profile as a base.
[Add New Task]		Low			<input type="checkbox"/> Not Started	
[Add New Task]		Low			<input type="checkbox"/> Not Started	

Status Key:

- ☐ **Not Started:** The task has not yet begun.
- ☐ **In Progress:** The task is currently being worked on.
- ☒ **Completed:** The task is finished.
- ☐ **Blocked:** Progress is halted due to an issue.