

Momentum Blueprint – Week 1

1. Introduction & Series Overview

- Topic: Consistency and standards in business/life
- Four-week series format (potential guest speakers)
- Trainer's approach: Realistic, positive, tactical, action-oriented
- Focus: Helping agents/participants realize and exceed their potential

2. The Importance of Momentum

- Momentum as a key driver in business success
- Analogy: Building a house (foundation, planning, finishing details)
- Key Point: Easier to maintain momentum than to start from zero
- The “Three-Week Rule”: Results lag behind effort by about three weeks

3. The Momentum Cycle

- Positive Cycle: Consistency → Confidence → Higher Sales → More Income → Better Mental State
- Negative Cycle: Break in activity → Loss of confidence → Anxiety → Lower sales → Desperation
- Emphasis: Maintaining standards and routines to keep the positive cycle going

4. Standards vs. Goals

- Standards: Non-negotiable behaviors/expectations, set by the individual
- Goals: Aspirations or targets (often set without raising standards)
- Key Message: “You do not rise to your goals; you fall to your standards.”
- Exercise: Participants reflect on their own standards vs. goals

5. Why Standards Matter

- Motivation fades; standards create consistency
- Consistency leads to confidence, which supports income and results
- Standards should be daily, actionable, and personal

6. Personal and Professional Standards

- Examples: Work ethic, discipline, integrity, follow-through, daily activity, client experience
- Discussion: Participants share their standards and areas for improvement

7. Consequences of Slipping Standards

- Slipping standards = backward progress and loss of accountability
- Importance of self-honesty and recalibration when standards slip
- Impact of leadership and culture on team standards

8. Making Standards Actionable

- Setting clear, daily, non-negotiable standards
- Communicating standards to family/team for accountability
- Tracking activity and results to reinforce belief and maintain standards

9. Vision for the Year

- Reflecting on personal and professional goals for the year
- Breaking down goals into actionable standards and routines

10. Planning for Success

- Setting minimum standards, next-level goals, and stretch goals
- Translating annual goals into monthly, weekly, and daily actions
- Importance of early and consistent effort

11. Anchoring Goals to a Strong “Why”

- Set goals tied to something bigger than oneself (family, team, responsibility)
- Emotional connection to goals increases commitment

12. Using Tools & Calculators for Clarity

- Introduction to “life income calculator” for setting realistic targets
- Walkthrough: Inputting applications, premium, compensation, placement, persistency, lead costs
- Outcome: Clear understanding of required daily/weekly activity

13. Tracking & Adjusting Activity

- Importance of tracking numbers (calls, leads, presentations, closes)
- Using first-month tracking to calibrate and set higher standards
- Solution for gaps: Increase training, coaching, and skill development

14. Handling Pressure, Rejection, and Bad Days

- Rejection as data, not defeat
- Consistency beats intensity
- Avoiding emotional decision-making based on daily results
- Stick to scheduled work hours and routines regardless of success or failure

15. Recovery & Reset Plans

- Identify personal reset strategies for bad days (affirmations, mentors, accountability partners)
- Value of a pre-determined “failure response plan”

16. Systems, Structure, and Time Blocking

- Time-blocking all key activities (prospecting, follow-up, admin, personal growth)
- Build a daily schedule and stick to it
- Leverage follow-up systems and consistent lead flow

17. Accountability & Public Commitment

- Identify personal/professional standards
- Select accountability partner and publicly commit
- Power of public commitment for follow-through

18. Habits & 75-Day Challenge

- Commit to one habit for 75 days (script review, lead gen, wellness)
- Impact of daily habits on long-term results

19. Final Thoughts & Next Steps

- Reminder: Standards today determine results tomorrow
- Challenge: Define one standard you will not break this year
- Homework: Come prepared next session with your standards and vision for the year
- Encouragement: You can change your trajectory and reach your goals with the right standards and consistency