PRE-INTERVIEW WORKSHEET · REQUIRED BEFORE THE CALL

The 90-Day *Advanced Practice* Business Plan.

Ten short sections. Fifty pointed questions. Complete this before the interview. The purpose is not the answers, the purpose is the picture the answers form when you see them on one page.

PREPARED BY

DATE

HOW TO USE THIS

1. Open in Adobe Acrobat, Preview, or any PDF reader that supports forms.
2. Type your answers directly into each field, or print and complete by hand.
3. Give yourself 45 to 60 minutes. Do it in one sitting if you can.
4. Bring it to the interview. If something is unfinished, leave it blank, that is data too.

01 The Honest Baseline

Before anything changes, the current picture has to be written down. Most agents have never done this on one page.

01.1 In the last 12 months, how many cases did you close, and what was your average commission per case?

01.2 Which three cases were the largest, and how did those clients actually come to you?

01.3 What percentage of your income came from repeat and referral vs cold effort?

01.4 How many hours a week are you working right now, and which of those hours produced revenue?

01.5

If the next 12 months looked identical to the last 12, would you be satisfied? Write the honest answer.

02 The Client You Actually Want

Vague target markets protect us from the harder question, do you know who you are trying to sit across from.

02.1 Describe your ideal future client in one paragraph. Industry, age, revenue or net worth, life stage.

02.2 What does that person currently believe about life insurance agents?

02.3 What would you need to say in the first two minutes for them to keep listening?

02.4 Who already advises them, attorney, CPA, wealth manager, and what do those advisors think of insurance people?

02.5 How many of these people do you personally know today?

03 The Vocabulary Gap

Advanced-planning conversations run on shared language. Agents plateau when the language stops.

03.1 In your own words, explain enterprise value to a business owner without using a product.

03.2 How do you describe estate liquidity to someone who has never heard the term?

03.3 What is your one-sentence framing for the difference between temporary and permanent coverage in a plan (not a pitch)?

03.4 Which technical concept in this market do you avoid because you are not confident explaining it?

03.5

Which three books, courses, or mentors would close the biggest gap for you this year?

04 The Revenue Math

> *Income at the next tier is not a bigger version of what you do now. It is a different mix.*

04.1 What is your target annual income 12 months from now, written as a specific number?

04.2 At your current average case size, how many cases would that require?

04.3 At three times your current average case size, how many cases would it require?

04.4 Which of those two numbers is realistic to prospect for?

04.5 What is the smallest change in your positioning that would let the second number become possible?

05 The Case Pipeline

A pipeline you cannot see is not a pipeline. This section makes it visible on one page.

05.1 List every active case in your pipeline right now by first name and estimated case size.

05.2 For each one, write the single next action and the date you will take it.

05.3 How many of these cases could plausibly turn into a $10K+ commission?

05.4 How many of them came from a professional referral source?

05.5 Which single case, if closed cleanly, would change your quarter?

06 The Referral Reality

Every serious practice runs on referred trust. This section forces the honest count.

06.1 How many CPAs and attorneys sent you a client in the last 12 months?

06.2 How many of those relationships did you initiate vs inherit?

06.3 What are you currently doing that would make a CPA confidently refer a client to you?

06.4 What could you do in the next 60 days to earn one new professional referral source?

06.5 Which client of yours could reasonably introduce you to their attorney or CPA this quarter?

07 The Positioning Problem

> *How you are perceived controls what people bring to you. Positioning is not marketing, it is the frame around every conversation.*

07.1 In one sentence, how do current clients describe what you do?

07.2 In one sentence, how do you wish they described it?

07.3 What would need to be true, in your work and in your language, for the second sentence to become the first?

07.4 Which of your current activities reinforce the old positioning?

07.5 Which single activity, added or removed, would move you fastest?

SECTION 8 OF 10

08 The Systems Audit

> *The next tier of income runs on systems, not effort. Effort is what got you to $100K. Systems are what get you past it.*

08.1 Where does a new inquiry currently live before it becomes a scheduled meeting?

08.2 How quickly, on average, does a new lead hear back from you?

08.3 What is your process for staying in front of the ten prospects who are not ready yet but will be?

08.4 What is your process for underwriting preparation on a large case?

08.5 Which one of these breaks first when you get busy?

09 The Time Ledger

> *Nobody moves upmarket by adding hours. They move upmarket by protecting the right hours.*

09.1 How many hours per week do you currently spend on prospecting and marketing?

09.2 How many hours on client meetings that could produce a large case?

09.3 How many hours on administration that someone else could do for less than your effective hourly rate?

09.4 What is the first hour you would reclaim if you had support?

09.5 What would you use that hour for instead?

10 The Interview Prep

These are the questions we will actually discuss. Write the answers now so the call is a conversation, not a warm-up.

10.1 What is the single biggest constraint keeping you from the next tier of client?

10.2 What have you already tried, and why did it not work?

10.3 What are you unwilling to change, and what are you willing to change?

10.4 If you were accepted into a program like this, what would you expect to be different 12 months from now?

10.5 What would make this the wrong fit, either for you or for us? Answer honestly.

CLOSING NOTE

You have just seen, on paper, why most agents plateau.

The gap is never effort. It is the frame, the vocabulary, and the systems. Bring this worksheet to the interview.