

The background of the slide is a dark blue gradient with a faint, light blue architectural floor plan overlaid. The floor plan shows various rooms, corridors, and structural lines, providing a professional and structured aesthetic.

Time Blocking for Insurance Agents Weekly Structure



Days of unfocused production.

The week feels full, but the pipeline is empty. Hours are eaten by whatever yells loudest—new leads, client questions, paperwork, portal lockouts.

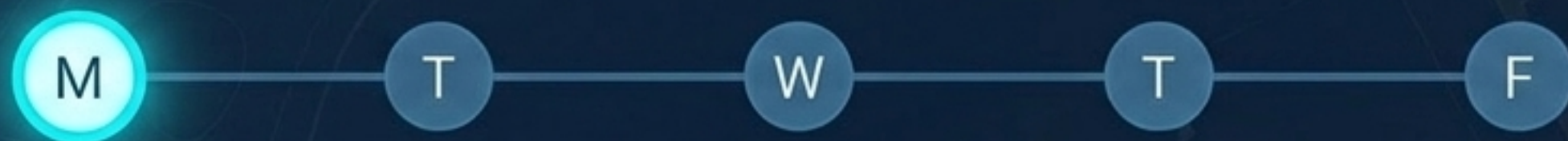


Days of focused production.

Time blocking fixes the structure problem, yielding higher overall production and consistent pipeline growth.

The schedule does not flex around the day. The day flexes around the schedule.

Decide what kind of work happens in what hours, and defend those hours like an appointment with your best client. Here is the template to copy as-is, then tune to your reality after 30 days.



Choose your week.

8:00 - 9:00

Plan the week. Look at every booked appointment, open lead, and follow-up. Block them before anything else lands.

9:00 - 12:00

Prospecting block. Outbound calls, referral asks, partner check-ins, follow-up on warm leads. No client service in this window.



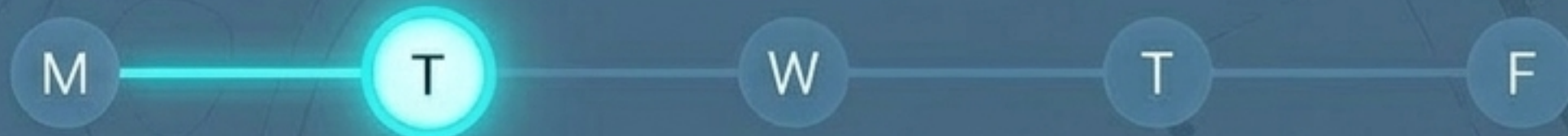
Front-load the energy.

1:00 - 4:30

Three appointment slots. Run these early in the week while energy is high and leads are fresh.

5:00

15-minute end-of-day pass. Log everything, send tomorrow's confirmations, close the laptop.



The heaviest production day.

8:00 - 9:00

Lead response & daily speed-to-lead window.

9:00 - 12:00

Three appointment slots.

1:00 - 2:00

Real lunch, away from the screen.

2:00 - 4:30

Three more appointment slots.

6

Appointments possible if tight and sharp.



The work that keeps the business standing.

8:00 - 12:00

Dedicated half-day for Admin & Compliance. Application submissions, AOR letters, carrier follow-ups, missing documents, and certifications.

Stop squeezing admin between appointments—dedicate the time, and the backlog stops growing.



Return to production.

1:00 - 4:30

Three appointment slots.
This carries the exact same shape
as Monday afternoon.



The second heavy production day.

This day repeats the exact shape of Tuesday: three slots in the morning, three in the afternoon, with a real lunch in the middle.

12 - 15

Potential appointments run by the end of Thursday.



Touch the people who already trust you.

8:00 - 10:00

Referral block. Reach out to clients who placed coverage in the last 90 days with 2-minute calls or personal texts. This work compounds.

10:00 - 12:00

Renewal and book review. Upcoming policy anniversaries, in-force changes, and plan exits.



Numbers in, numbers out.

1:00 - 3:00

Finish anything urgent.

3:00 - 4:30

Weekly review. Track leads, appointments, applications, and dollars produced. Write next week's plan in 20 minutes while it is fresh.

4:30

You are done.

Guardrails that protect the structure.

Defend Prospecting.

The block is the appointment. Do not let a client request bump it, or prospecting starts losing every fight.

Protect Admin.

If you skip Wednesday admin three weeks in a row, you are not running a business, you are managing a fire.

Enforce Boundaries.

No appointments before 9:00 AM or after 5:00 PM (except pre-existing client situations). A defended schedule ensures you survive 30 years instead of burning out in three.

The 5-minute exception flow.



The original time block remains unbroken.

Architect your week tonight.

- Open your calendar and build next week against this template.
- Create a recurring block for Prospecting (Monday morning).
- Create a recurring block for Admin (Wednesday morning).
- Create a recurring block for Referral & Renewal (Friday morning).

*Make these recurring weekly appointments on a distinct color.
Then watch what happens to your numbers in 30 days.*