

How to Get New Insurance Agents Producing Fast

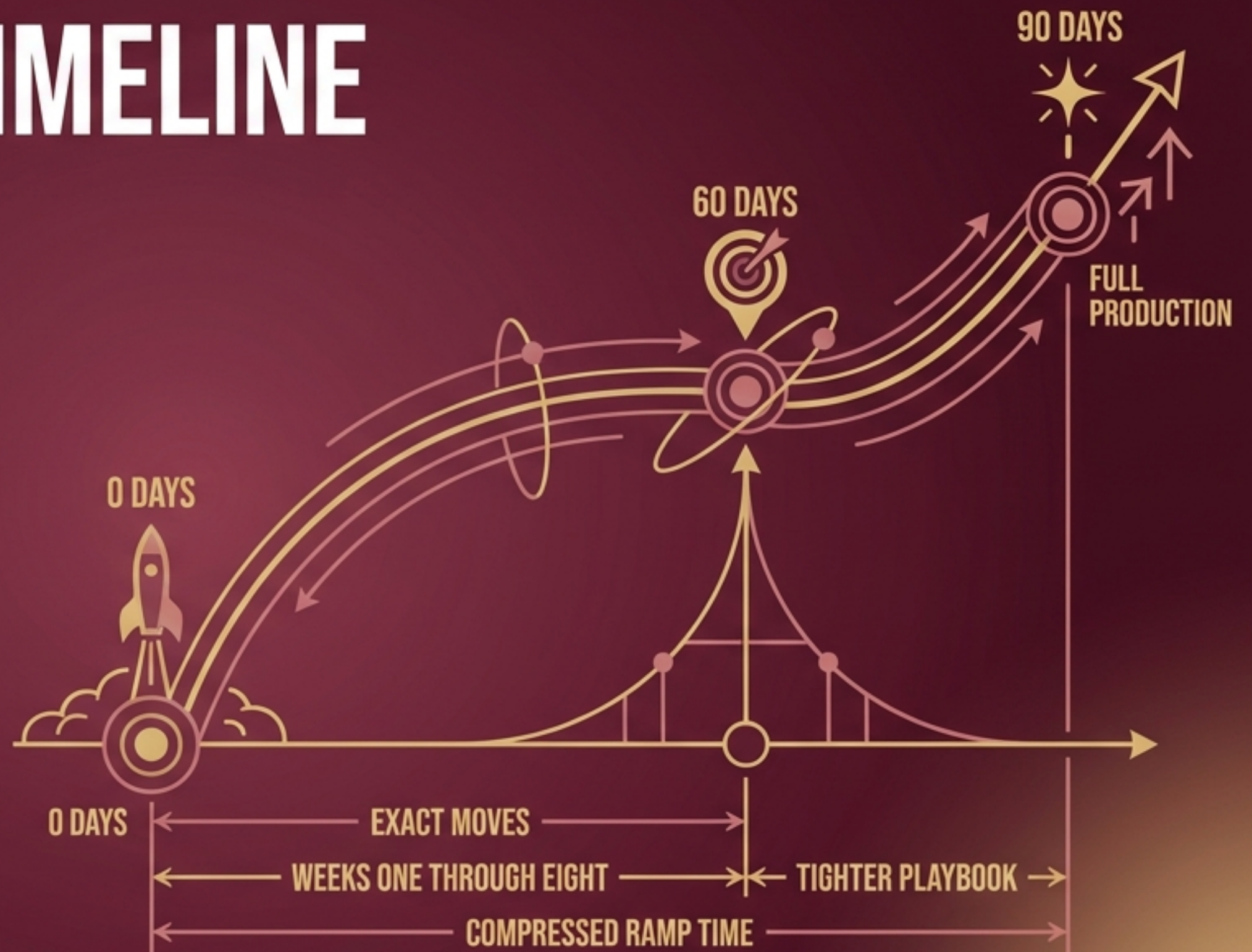
THE SIXTY-DAY TIMELINE

You hired well. You onboarded by the book. The producer is licensed, trained, and sitting at a desk. Now you need them writing

applications. Not at month six. Not at month four. Inside the first sixty days, with a clear path to full production by day ninety.

This training shows you the exact moves that compress ramp time without cutting corners.

The agencies that get producers to production fastest are not luckier. They run a tighter playbook in weeks one through eight, and that playbook is teachable.



THE COST OF WAITING

Here is why this matters for your business. Every week a new producer is not writing business is a week of fixed cost without revenue. Lead spend, training time, payroll if they are W-two, override leakage on the leads they are not closing. A producer who hits production target at day sixty is roughly twice as profitable in their first year as a producer who hits target at day one hundred and twenty.

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2x
Profitable

SPEED WITHOUT SHORTCUTS

The fear most agency owners carry is that pushing for early production turns into pushing the producer to cut corners. Bad apps. Compliance issues. Burnout. That fear is valid only when ramp speed is built on pressure. The technique here is built on lead quality, product narrowing, and a closing structure the producer can repeat. Speed without shortcuts.



Step 1: Product Narrowing

Step one is product narrowing. The single biggest reason new producers ramp slowly is that they are trying to learn three or four products at once. Your agency may write Med Supp, Medicare Advantage, final expense, ACA, and term life. The new producer should not.

Pick one product for the first thirty days. Pick the product that matches your strongest lead source and has the simplest sales cycle in your book. For most independent agencies, that is either Med Supp or final expense. The producer learns one product, one rate sheet, one underwriting flow, one application path, one set of objections.



Layering on Competence

The Trap

The trap most owners fall into is trying to make the producer a generalist on day one because the agency is a generalist. The producer cannot be a generalist on day one. The producer needs to be excellent at one thing first.

The Playbook

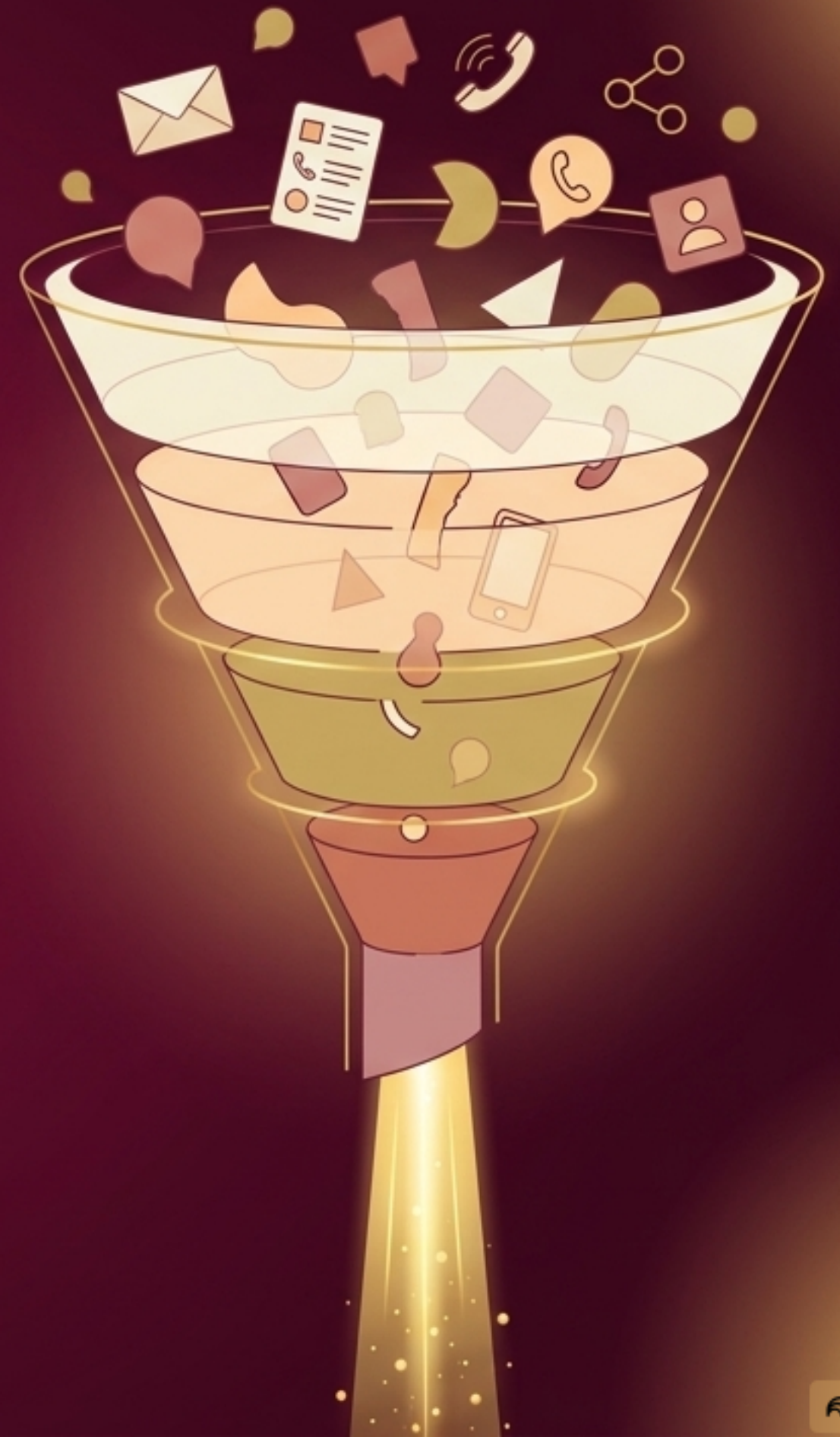
By day thirty, they have written real business in that single product. By day forty five, you add the second product. By day sixty, the third. Layer the products on top of competence, not in place of it.

Avoid the generalist trap by mastering one product first. New products should be layered only after competence is established.

Step 2: Lead Quality

Step two is lead quality, not lead volume. New producers do not need more leads. They need cleaner leads.

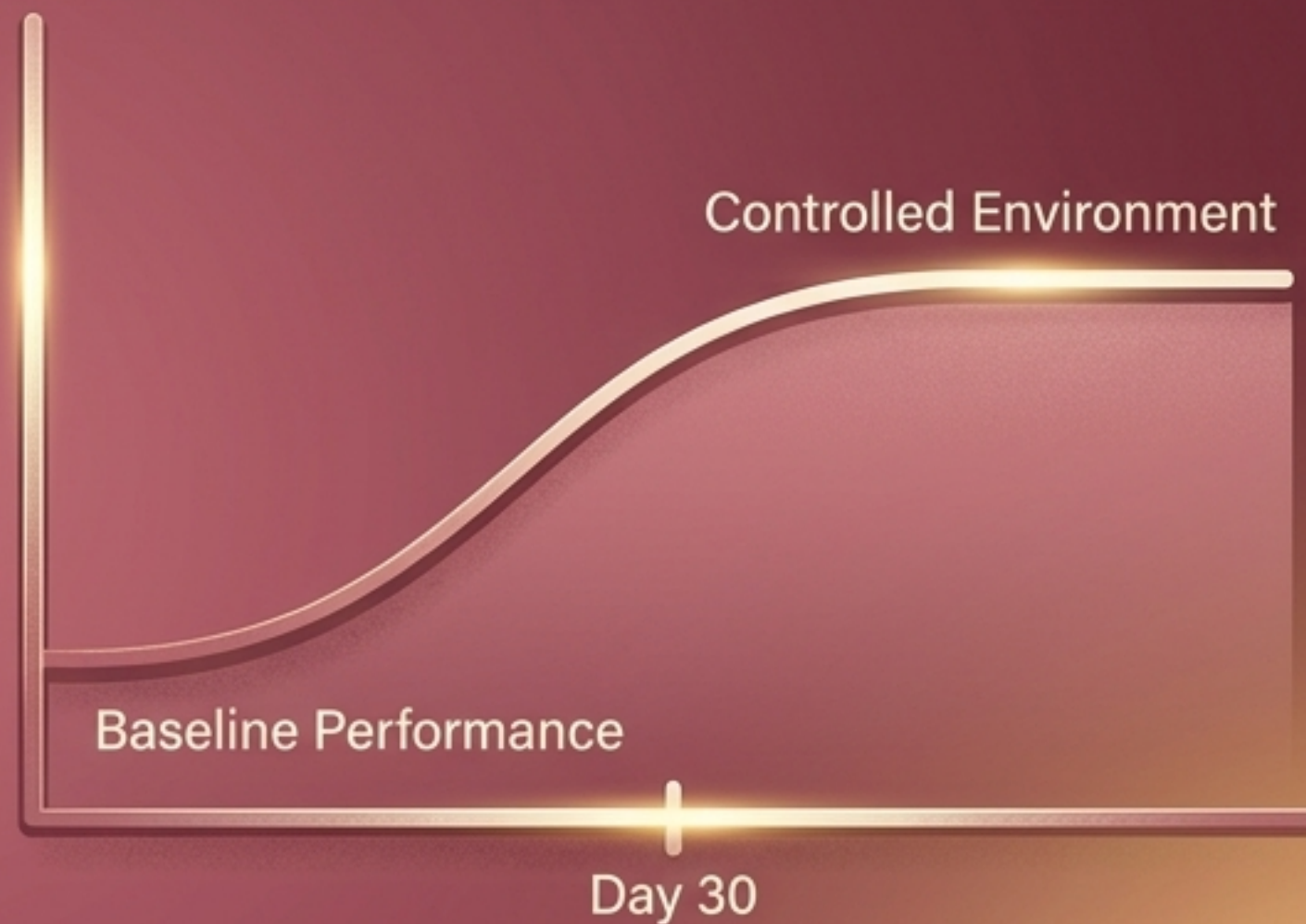
For the first thirty days, the producer gets a defined slice of your highest converting lead source. Not your hardest. Not the rejects from your senior agents. The cleanest leads you can give them. T sixty five lists with a current address and a phone number that works. Direct mail responders. Referrals from your existing book if you have any to spare.



Controlling the Variable

Cleaner leads do two things. They protect the producer's confidence in the first thirty days, when one bad week of cold disconnects can break a new agent. And they give you a clean read on whether the producer can actually close, because the lead quality variable is controlled.

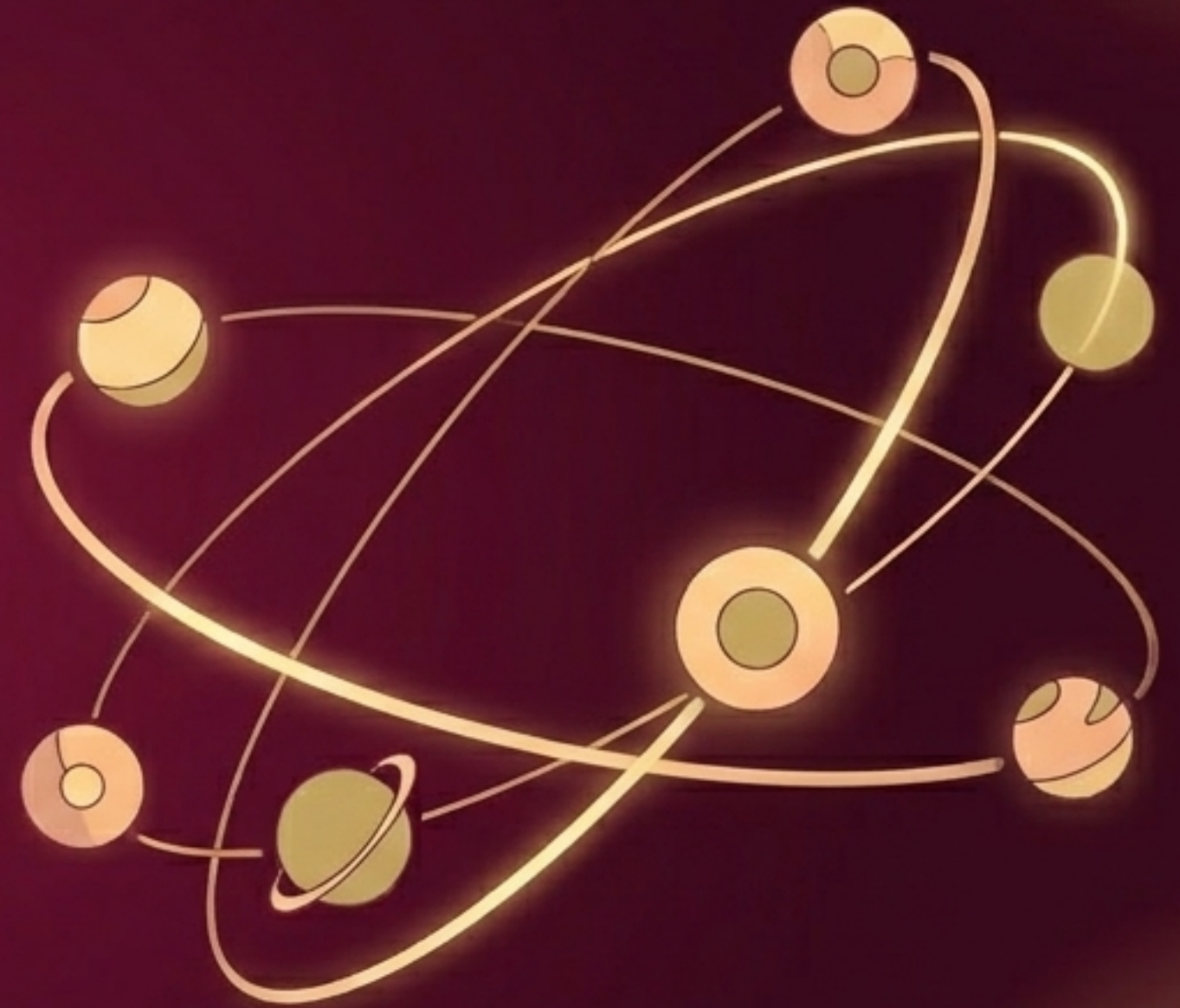
By day thirty one, after you have a real read on their close rate against clean leads, you can introduce harder lead sources. Aged leads, internet leads, voicemail follow ups. Now the producer has a baseline to compare against, and you can coach to the specific problem.



Step 3: The Closing Structure

Be transparent with the producer about which leads they are getting and why. Hiding lead quality is a trust break that takes years to repair.

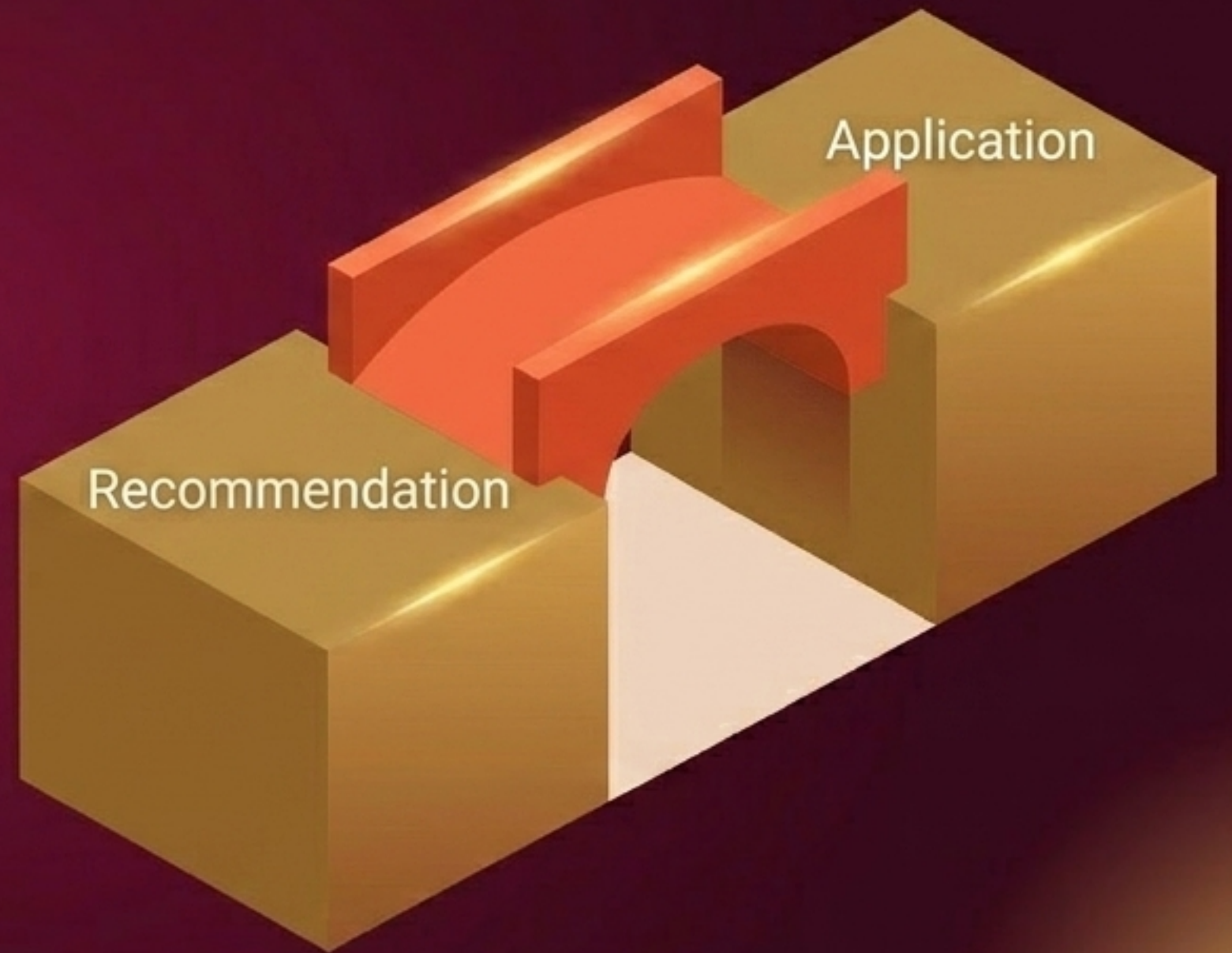
Step three is the closing structure. New producers stall at the close because they have never been taught one. They are guessing. For the first sixty days, every appointment follows the same six step flow. Open with the reason they are talking. Confirm the client's situation in two or three sentences. Walk through the product as it fits. Compare two specific options. Recommend one based on what the client said. Move directly to the application without a pause.



Removing the Pause

The pause is what kills new producer close rates. After the recommendation, the new producer waits. The client fills the silence with hesitation. The hesitation hardens into a no.

The structure removes the pause by treating the application as the natural next step. You teach the producer to say something like, based on what you told me, the option that fits is this one. I have the application open. Let me ask the first few questions and we can see if you qualify.



Taking the Next Step

The producer is not asking permission to sell. They are taking the next step in the work the client already agreed to.

This single change, removing the pause after the recommendation, can lift a new producer's close rate by ten to fifteen points in the first sixty days.



**10 to 15
Points**

Step 4: Daily Targets

Step four is daily activity targets, not weekly. New producers benefit from from short feedback loops. Weekly targets let three bad days hide.

Set daily numbers for the first sixty days. Call attempts. Contacts made. Appointments booked. In writing, reviewed every day for two weeks, every other day through day thirty, weekly through day sixty.

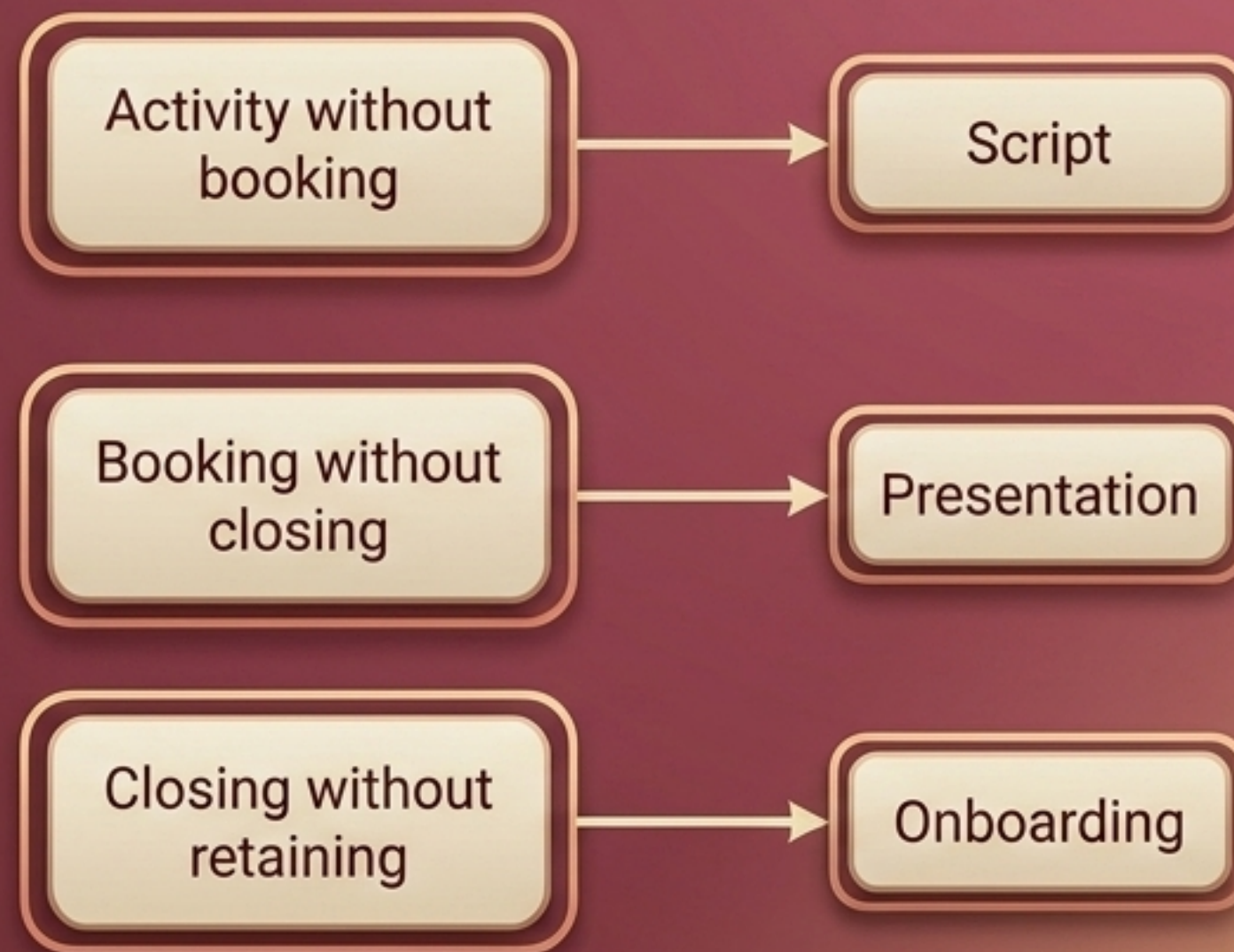


The Diagnostic Dashboard

The numbers are diagnostic, not punitive. A producer hitting activity but not booking has a phone script problem. Booking but not closing is a presentation problem. Closing but not retaining is an onboarding problem with their own clients.

Daily numbers tell you where to coach within forty eight hours, not four weeks.

Always check current carrier and C-M-S marketing rules and your state regulations on outbound contact, lead handling, and call frequency before setting any activity targets. Activity expectations must align with applicable rules.



Step 5: The Daily Debrief

Step five is the daily debrief. Five minutes at the end of every working day for the first thirty days.

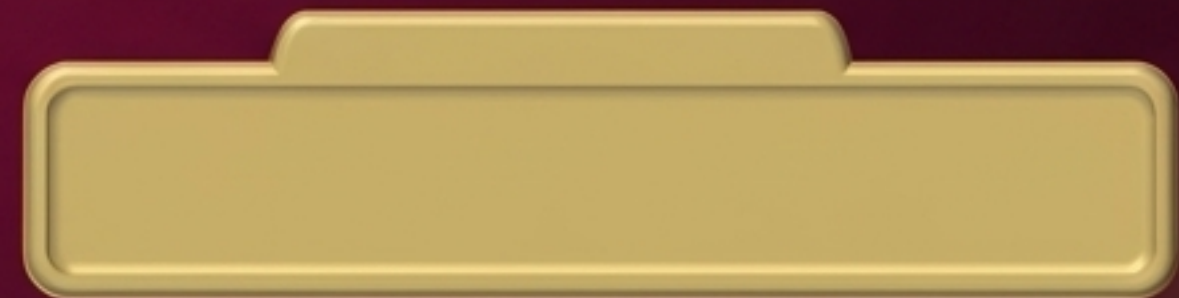
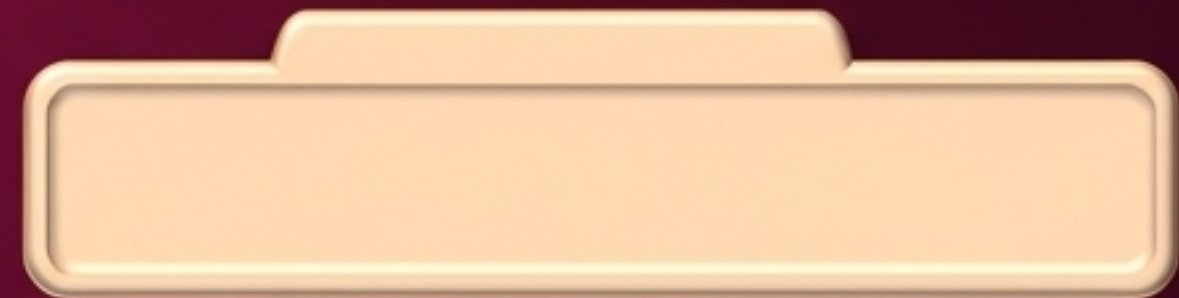
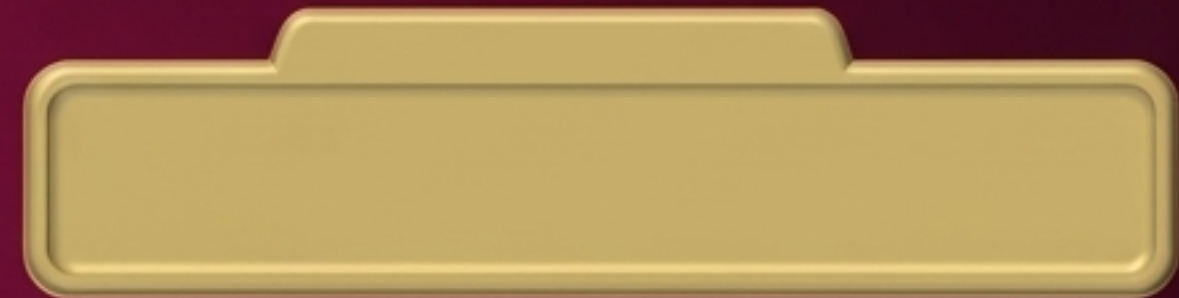
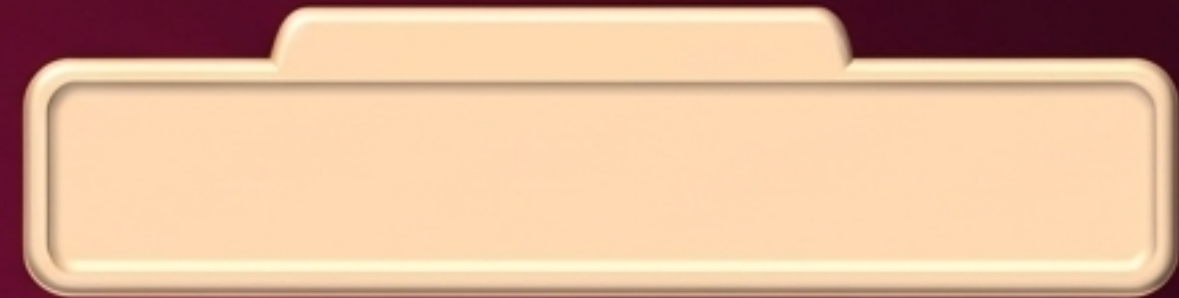
Not a meeting. A check in.

What did you book today.

What was the best call you ran.

What was the call that did not go well.

What is the one thing you want to do better tomorrow.



Building Self-Review

Four questions. Five minutes. Every day. No skipping. It catches small problems on day three instead of day twenty three, and it builds the daily habit of self review that separates producers who plateau at year two from producers who keep growing for a decade.



5 Minutes


The Trajectory: Days 1 to 15

Here is how this comes together. Days one through five, product immersion in Med Supp only. Day six, first intake call with you on the line. Days six through fifteen, twenty cleaned Ts leads, ten appointments booked, you ride along on the first five and the producer runs the next five solo.



The Trajectory: Days 16 to 90

Days sixteen through thirty, twelve appointments, four Med Supp applications. Close rate around thirty three percent against clean leads is healthy for a new producer. Day thirty one, final expense added. Day forty five, both products, eight applications total. Days forty six through sixty, harder lead types introduced. Close rate drops to twenty percent against mixed quality. Normal. By day sixty, you're a month on a three product mix.



33% Close Rate

Common Mistakes to Avoid

Common mistake to avoid. Do not let the producer chase volume in week one to feel productive. Twenty cold calls in week one is worse than ten warm intake calls done well. Confidence comes from competence, not from busyness.

Another common mistake. Do not stop the daily debrief at day fifteen. The first thirty days is the rule. Stopping early is how producers regress in week four after a strong week three.



Write the Playbook

Your action step today.

Pull your last twelve months of personal production and **find the single product that converted the highest percentage of leads into applications.**

That is the product your next new producer learns first. Write it down. Write the lead source they will be assigned for days one through thirty. Write the daily activity targets. Write the four debrief questions on a single sheet of paper. Tape that sheet to the wall behind your desk. Every new producer from this point forward starts with that exact playbook.

The agencies that ramp producers fastest are not the ones with the best leads. They are the ones with the most boring, most repeatable first sixty day plan. Boring is what scales.

