

RGI BONDING

CALLS 20

BINDS 15

PREMIUM \$

PRODUCER SCOREBOARD

Weekly Performance Handbook

PERFORMANCE. DISCIPLINE. EXECUTION.

RGI Bonding — Producer Scoreboard (Weekly)

Producer: _____ **Week of:** _____ to _____

Goal for the week: (ex: 2 bonds issued / 5 quotes sent / 10 assessments)

1) Activity (Inputs)

Metric	Target	Actual
New Leads Added	—	—
First Contacts Made (calls/texts/emails)	—	—
Follow-ups Completed (due this week)	—	—
Needs Assessments Completed (real conversations)	—	—
Document Requests Sent	—	—

2) Pipeline Movement (Execution)

Metric	Target	Actual
Moved to Documents Requested	—	—
Moved to Underwriting Review	—	—
Quotes Generated	—	—
Quotes Sent	—	—
Client Approvals	—	—

3) Results (Outputs)

Metric	Target	Actual
Bonds Issued	—	—
Deals Closed Won	—	—
Total Premium \$ (or Bond Premium \$)	—	—
Commission \$ (if tracked)	—	—

4) Follow-Up Health (This is the discipline section)

Metric	Goal	Actual
Overdue Follow-ups in HelloLeads	0	—
Oldest Lead w/ No Contact (days)	—	—

Stale Quotes (Quote Sent > 7 days)	—	—
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5) Top 10 Power List (What I'm closing next)

Write the 10 leads you're focused on this week (highest value / closest to decision):

#	Lead	Stage	Next Step + Date
1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____
4	_____	_____	_____
5	_____	_____	_____
6	_____	_____	_____
7	_____	_____	_____
8	_____	_____	_____
9	_____	_____	_____
10	_____	_____	_____

6) Weekly Debrief (2 minutes)

Wins:

Stuck deals + why:

Support needed (who/what):

One focus for next week:
