Upside Down Meeting

Name: Date:

Stats: (Could be what was quoted and what was landed. What training doc was created…) Contacted… Quoted… Landed… Projection. What I’m doing to help initiate quotes, quote, and land P&C business.

1. Last meeting Action Items:(taken straight from the bottom of the last UDM) (from me- from others)
2. Current Events: (discussion on red flags, client meetings, reviews)
   * *Time Design (review and discussion of time design for next one-week period)*
3. Celebrations and Bragging Rights:
4. Opportunities & Issues: (activity, team, campaigns, sale, learning, concerns)
5. Projects & Professional Development I am responsible for: (plan, thoughts so far, dates)
6. What I Need from My Agency:
7. Tasks Added since the last meeting….

1. Actions from this meeting: (Items identified from this meeting, who might I need help from what are rough deadlines)

(from me- from others)