

Protege Agent Graduation Checklist

Production (Must Be Specific & Measurable)

- ■ Defined daily/weekly quoting target: _____ quotes per day/week
- ■ Defined monthly premium goal: \$_____ per month
- ■ Defined annual premium goal: \$_____ per year
- ■ Consistently hits quoting and production targets
- ■ Maintains a repeatable and documented sales process
- ■ Manages pipeline independently

Sales & Process Mastery

- ■ Confident in coverage conversations (not just price selling)
- ■ Handles objections independently
- ■ Uses CRM/system consistently
- ■ Executes follow-up process without prompting

Lead Generation

- ■ Has 2–3 consistent lead sources
- ■ Understands cost vs return on leads
- ■ Generates opportunities independently

Team Building

- ■ Participates in interviewing process
- ■ Helps onboard/train a new team member
- ■ Understands agency roles and responsibilities

Delegation & Leadership

- ■ Successfully delegates tasks without loss of quality
- ■ Holds team accountable to performance
- ■ Balances selling and leading responsibilities

Business Planning & Financials

- ■ Completed annual agency budget
- ■ Understands revenue, expenses, and profitability
- ■ Built a simple business plan

Goal Setting

- ■ Defined annual production goal: \$_____
- ■ Established goals for each team member
- ■ Tracks and reviews goals regularly

Mindset & Ownership

- ■ Takes ownership of results
- ■ Demonstrates consistency and discipline
- ■ Thinks long-term and acts like an owner