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Insurance Sales Challenge-Focused Workbook

Worksheets built around the likely challenges and 90-day development priorities in the Birkman report

How to use this workbook
This version is built to support the likely challenge areas in the report rather than general sales practice. The focus is on four areas that may most affect results in individual health insurance sales: moving too fast, reacting to pushback, debating instead of guiding, and letting pressure or fatigue affect judgment. Each worksheet explains its purpose, why the action matters, and how it supports the 90-day plan.

Likely challenge themes this workbook is designed to support

Jake, this workbook assumes you likely bring strong energy, directness, and persuasive drive to client conversations. Those strengths can help you create momentum. At the same time, the report suggests a few patterns may get in the way when pressure rises. You may move ahead before the client feels fully understood. You may feel more tension from pushback than others realize. You may drift into debate when the better move is to guide the client calmly. You may also look highly energized on the outside while still needing more reset time than people expect. The pages that follow are meant to help you protect trust, improve decision quality, and stay steady across the full 90 days.

How the 90-day plan is organized

Focus area	What to do	Done
Days 1-30	Slow down at the right moments and improve discovery discipline before presenting solutions.	
Days 31-60	Handle objections without debate and strengthen close timing, trust, and decision support.	
Days 61-90	Protect consistency through recovery habits, follow-through systems, and weekly review.	

Worksheet 1: Challenge pattern and trigger map

Purpose
This worksheet helps you notice when your strengths begin to turn into pressure. The goal is awareness, not self-criticism.

Why this worksheet is recommended
The report suggests that your best sales strengths may become less effective when pace, pushback, or fatigue rise. You are more likely to improve a pattern that you can name early. This page helps you spot those patterns before they damage a client conversation or a selling week.

When I am at my best with a client, I tend to:

_____

_____

The challenge I most need to watch is:

_____

_____

The early warning signs that I am moving too fast, getting forceful, or losing focus are:

_____

_____

_____

The trigger situations that most often bring out those warning signs are:

_____

_____

_____

What I want to do instead in those moments is:

_____

_____

_____

Worksheet 2: Discovery-before-recommendation planner

Purpose
This worksheet helps you make sure persuasion comes after understanding, not before it.

Why this worksheet is recommended
In individual health insurance sales, clients are often buying while anxious or confused. A fast, confident style can help, but only if the client first feels heard. This page supports the first 30 days of the plan by slowing the process at the right moment and protecting discovery quality.

Client name / segment / source:

_____

What does this client likely care about most: budget, doctors, prescriptions, risk protection, timing, or simplicity?

_____

_____

_____

What questions do I still need answered before I recommend anything?

_____

_____

_____

What is the client's biggest fear or frustration about choosing coverage?

_____

_____

_____

My best sentence to slow the pace and deepen discovery is:

_____

_____

Before I present options, what proof do I have that I understand their situation?

_____

_____

_____

Worksheet 3: Client needs and tradeoff worksheet

Purpose
This worksheet helps you turn complex plan details into a clear and honest recommendation.

Why this worksheet is recommended
The report suggests you may be good at simplifying information and leading the conversation. That can be a major advantage in health insurance. The risk is simplifying so quickly that real tradeoffs get lost. This page helps you show the client that you are guiding, not pushing.

Option 1 - best fit and why:

_____

_____

_____

Option 2 - backup fit and why:

_____

_____

_____

The most important tradeoff between these two options is:

_____

_____

_____

How I will explain that tradeoff in plain language:

_____

_____

_____

The check-for-understanding question I will ask before moving toward a decision is:

_____

_____

Worksheet 4: Objection handling without debate

Purpose
This worksheet helps you stay calm and useful when a client pushes back.

Why this worksheet is recommended
The report suggests that pushback may feel more personal or frustrating than others see on the surface. That can make a strong seller sound sharp, defensive, or overly certain. This page supports days 31-60 of the plan by helping you respond in a guide-not-debate way.

The objection that most often throws me off is:

_____

_____

What does this objection usually mean underneath the words?

_____

_____

_____

My sentence to name the concern respectfully is:

_____

_____

My clarifying question to find the real issue is:

_____

_____

My recommendation sentence after clarification is:

_____

_____

What I must avoid saying when I feel triggered is:

_____

_____

Worksheet 5: Calm close readiness check

Purpose
This worksheet helps you ask for commitment without creating pressure that hurts trust.

Why this worksheet is recommended
A direct style can help you ask for the business clearly. The challenge is knowing whether the client is ready or only being polite. This page helps you separate a ready client from an uncertain one so you can close with confidence or schedule the right next step.

What signs show this client understands the recommendation?

_____

_____

What signs show this client still needs reassurance or information?

_____

_____

My best close question for this client is:

_____

_____

If they are not ready today, what exact next step will I schedule before ending the call?

_____

_____

What would a calm, client-centered close sound like in my own words?

_____

_____

_____

Worksheet 6: Follow-through and routine discipline sheet

Purpose
This worksheet helps you keep service and follow-up from slipping when the week gets busy.

Why this worksheet is recommended
The report suggests that high pace and variety may energize you more than routine work. That can create a gap after a strong call, especially when paperwork, callbacks, or retention steps feel less exciting. This page supports days 61-90 by turning follow-through into a simple visible system.

The routine task I am most likely to delay is:

_____

_____

What business cost shows up when I delay that step?

_____

_____

_____

What system will I use so every client leaves with a next step, date, and owner?

_____

_____

_____

What is my same-day follow-up standard after a strong conversation?

_____

_____

_____

What is my weekly service and retention check routine?

_____

_____

_____

Worksheet 7: Energy, pressure, and reset plan

Purpose
This worksheet helps you protect judgment and consistency by using recovery on purpose.

Why this worksheet is recommended
The report suggests you may appear highly energized while still needing more recovery time than others expect. When that need is ignored, decision quality, patience, and focus may drop. This page helps you keep your edge without running hot all week.

What does pressure look like in my body, tone, and thinking before others would notice it?

_____

_____

_____

What two short reset actions help me come back to a better pace?

_____

_____

_____

Where will I block reset time into my workday?

_____

_____

What boundary protects me from carrying one hard client into the next call?

_____

_____

_____

Who is my best check-in person when the week gets heavy?

_____

_____

Worksheet 8: Weekly self-coaching review

Purpose
This worksheet turns experience into learning instead of letting one good or bad week define the story.

Why this worksheet is recommended
The 90-day plan depends on repeated review, not just good intentions. This page helps you see patterns in a practical way so you can adjust before they become habits.

Where did I slow the pressure and improve discovery this week?

_____

_____

_____

Where did I still rush, debate, or miss the real concern?

_____

_____

_____

Which objection did I handle well, and why?

_____

_____

_____

Where did fatigue or pressure affect my tone, patience, or judgment?

_____

_____

_____

What one adjustment will matter most next week?

_____

_____

Worksheet 9: 30-day action plan page

Purpose
This worksheet gives each phase of the 90-day plan a small number of behaviors to practice on purpose.

Why this worksheet is recommended
Change usually holds when the actions are specific, visible, and repeated. This page keeps the plan practical by linking one month of effort to a few actions you can actually track.

My top two behavior targets for the next 30 days are:

_____

_____

The exact sentence or routine I will practice in live calls is:

_____

_____

_____

The metric I will track each week is:

_____

_____

What support do I need from my manager, coach, or accountability partner?

_____

_____

Worksheet 10: 90-day scoreboard and reflection

Purpose
This worksheet helps you connect behavior change to business results over time.

Why this worksheet is recommended
The point of this workbook is not only to feel more self-aware. The point is to improve outcomes. This final page helps you measure whether the development work is showing up in discovery quality, trust, close timing, follow-through, and consistency.

My baseline results at the start of the 90 days were:

_____

_____

My three most important metrics are:

_____

_____

The behavior change that helped results most was:

_____

_____

_____

The challenge that still needs more support is:

_____

_____

_____

What I will carry forward into the next 90 days is:

_____

_____

_____

Suggested weekly use rhythm

At the start of the week, complete the 30-day action plan page and the energy, pressure, and reset plan. Before important client calls, use the discovery-before-recommendation planner and the client needs and tradeoff worksheet. After difficult calls or objections, use the objection handling page. At the end of each week, use the weekly self-coaching review and update the 90-day scoreboard.

Focus area	What to do	Done
Monday	Choose one behavior target, block reset time, and identify key client conversations.	
Before calls	Use discovery and tradeoff worksheets for important opportunities.	
After hard calls	Complete the objection page or reset plan before the next client.	
Friday	Complete weekly review and update the scoreboard.	