Legacy Agent Daily Prospecting Checklist

Inspired by Brian Tracy's time-tested methods for sales success

Daily Prospecting Checklist

For Life Insurance Agents Focused on Consistent Production

Morning Setup

[ ] Review appointments for the day
[ ] Respond to priority emails, texts, or CRM tasks
[ ] Post 1 piece of content to your social media (testimonial, story, or reminder)
[ ] Practice your script or objection handling for 10 minutes

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Outbound Activity Goals (Set.a.daily.target.for.each)

[ ] ___ New conversations (cold or warm market)
[ ] ___ Follow-up calls/texts from CRM
[ ] ___ Referral asks (past client or family/friend)
[ ] ___ Social media DMs or comments initiated
[ ] ___ Networking interaction (group, event, local connection)

Pipeline Work

[ ] Check on pending applications or carrier issues
[ ] Send a personalized check-in message to leads from past 7 days
[ ] Move leads through CRM pipeline stages (New → Contacted → Quoted → App Sent → App Submitted)

Mindset & Momentum

[ ] Read 1 page from a sales or mindset book
[ ] Listen to 10 minutes of a sales podcast or training
[ ] Review your “why” or goal sheet
[ ] Encourage another agent or team member

End-of-Day Wrap-Up

[ ] Log today’s production activity in CRM or tracker
[ ] Reschedule missed calls or follow-ups
[ ] Reflect: What worked? What didn’t?
[ ] Set tomorrow’s priority list (3 top tasks)

Notes: