

Making the numbers

You've made MDRT, so you're obviously doing a lot of things right. But no matter where you are in your career, there's always something you can do better. Through my years as a financial advisor, I've found two strategies that have consistently kept me moving forward: tracking my daily activity and attending the MDRT Annual Meeting.

To maintain and enhance productivity, you have to start with the basics: keeping track of your numbers. Without a system to measure and analyze your business activities, you're essentially flying blind.

MDRT has some fantastic tools to help you monitor your activity and reach your goals. The Production Tracker lets you input your monthly and yearly goals for income, premiums and commission in the currency of your country. Then simply plug in your activity each week or month, and the tracker will let you know if you're where you should be to meet the year's goal. Find the free tracker at mdrt.org/monthly-progress.

The Annual Meeting supports your efforts to meet and surpass your goals. We have members who are highly productive already, but have found that through consistently attending meetings, they enhance their productivity and move forward.

The meeting is a chance for face-to-face interactions with industry leaders and other members. The whole concept of MDRT is member sharing to help fellow members grow and improve, and the meeting is the perfect



opportunity for this. Maybe you'll learn an idea from a member at a networking event or pick up a strategy at a Focus Session. Or maybe a Main Platform speaker will help you view your work in a whole new light. The bottom line is you're bound to leave with a takeaway you can put into practice right away.

To be successful in this industry, ask yourself a simple question: Am I engaging enough in the right activities to be successful? If the answer to that isn't a resounding yes, recommit to the numbers and register for the Annual Meeting. You'll find yourself moving to the next level in no time.

*James D. Pittman, CLU, CFP
First Vice President*

**Ask yourself:
Am I engaging
enough in
the right
activities to be
successful?**