

Business Planning Template



Name: _____

My sales market (counties): _____

Sales leader: _____

Date submitted for review & discussion: _____ Plan launch date: _____

1. Sales/Earnings Goals:

- Projected Enrollments: Monthly average _____ SEP _____ AEP _____
- Annual Earnings Goal: _____

2. Plan service area I will access to achieve my goals (discuss with your local UnitedHealthcare sales leader for alignment):

- County: _____ Enrollment goal: _____
- County: _____ Enrollment goal: _____
- County: _____ Enrollment goal: _____

3. Which opportunities have you identified to achieve your goals (who, what, where, when and how?)

Directions:

- **Identify 5 Opportunities:** People, places, events that require *action* (list the opportunity broadly like a headline compared to goals which are specific).
- **Goals:** Specific activities that support your opportunity. Be SMART (Specific, Measurable, Attainable, Realistic, and Timeframe goals).
- **Timeframes:** Immediate (within 30 days, (Short-Term (30-60 days), Mid-Term (4-6 months) and Long-Term or annually; or you may list timeframes per quarter.
- **Roadblocks:** Obstacles that may prevent you from reaching your goals.
- **Resources:** People, sources and training that may assist you in meeting your goals.



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Example:

- **Opportunity:** Networking
- **Opportunity Description:** Meet program directors responsible for senior community centers.
- **Goal:** Schedule in person meeting with program directors from five senior community centers within thirty days to introduce myself and provide resources and assistance.
- **Additional Goal:** To maintain year-round in person or phone touchpoint every thirty days at minimum.
- **Roadblocks:** Limited timeframe, commitment to other business endeavors, focus on high sell time during AEP, personal commitments, conferences/meetings etc.
- **Resources:** Learning Lab, Jarvis, and National Webinars.

Opportunity #1: _____

Opportunity Description: _____

SMART Goals	Time Frame	Potential Roadblocks	Resources To Use	Completion Date
1.				
2.				
3.				
4.				
5.				

Opportunity #2: _____

Opportunity Description: _____

SMART Goals	Time Frame	Potential Roadblocks	Resources To Use	Completion Date
1.				
2.				
3.				
4.				
5.				



Business Planning Template

Opportunity #3: _____

Opportunity Description: _____

SMART Goals	Time Frame	Potential Roadblocks	Resources To Use	Completion Date
1.				
2.				
3.				
4.				
5.				

Opportunity #4: _____

Opportunity Description: _____

SMART Goals	Time Frame	Potential Roadblocks	Resources To Use	Completion Date
1.				
2.				
3.				
4.				
5.				

Opportunity #5: _____

Opportunity Description: _____

SMART Goals	Time Frame	Potential Roadblocks	Resources To Use	Completion Date
1.				
2.				
3.				
4.				
5.				