

FOUNDATIONS

THE EIGHT THINGS

Not competitive in my area

Too many agents in my area

Bad contract

Claims issues

Service hold times

Internet leads don't work

No good employees in my area

My customers don't have money

FOUNDATIONS

THE FIVE PILLARS

Systems

Capacity

Training

Marketing

Culture

FOUNDATIONS

CAPACITY

Office Organization

Customer Care

Account Rep

"Do"s and "Don't"s of Auto Quoting

Contact Rep



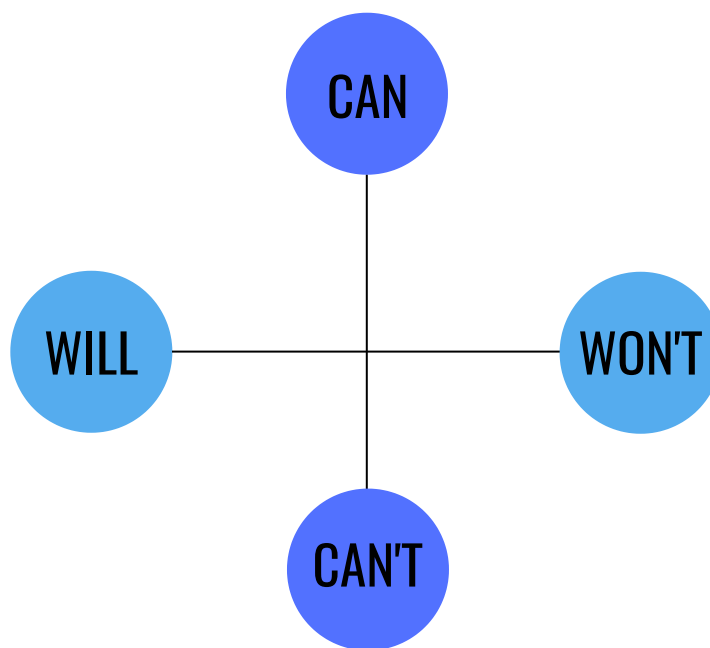
TROPHY CLUB
CONSULTING LLC

"DISCIPLINE TAKES NO VACATION"

FOUNDATIONS

CAPACITY

2 T Graph



Who do we recruit?

The 3Ps

FOUNDATIONS

CAPACITY

When to recruit

How to recruit

Interview Process

Onboarding

FOUNDATIONS

SYSTEMS

Outlook Rules

Outlook Folders

Outlook Calendar

Phones/Skype

FOUNDATIONS

SYSTEMS

Chat

Auto/Fire/Life/SFPP Answers

AFS

SF Connect

FOUNDATIONS

SYSTEMS

Expectations & Accountability

Account Reps

Customer Care Reps

Contact Reps
