

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

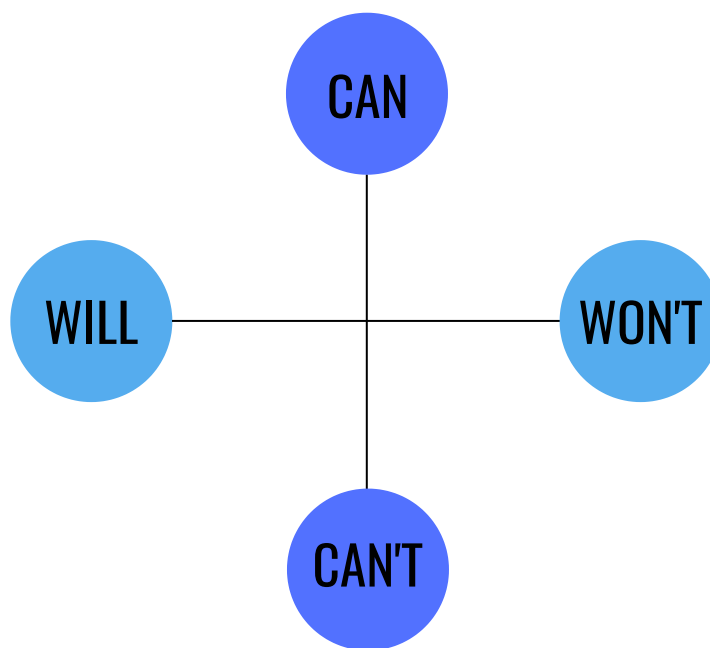
"Do"s and "Don't"s of Auto Quoting

Contact Rep

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/ TRAINING

Expectations & Accountability

Account Reps

Customer Care Reps

Contact Reps

FOUNDATIONS

SYSTEMS/ TRAINING

Sales Activity Tracking

UC/Phone Reports

Quote Tracking

Customer Care Tracking

FOUNDATIONS

TRAINING

Team Meetings

Four Phases of Employment

Three Phases of Development

FOUNDATIONS

MARKETING

Tier I : In-book

Premium by Household
Auto No Fire
Fire No Auto
BOD Premium Decreases
250/500/100 No PLUP

Term Life
Permanent Life
Home Without a Mortgage
Renters No Life Age 50+
Med Supp Age 65

Life Only Customers
Renters with 1K Deductibles
Key ages customers
(59,62,65,70,72)

Tier II: Direct Marketing

Search Engine Marketing (SEM)

Internet Leads

Direct Connect Leads

Contact Center (optional)

FOUNDATIONS

MARKETING

Tier III : Community Marketing

Branding: Social media, news media, flyers, pens, cars

Passive: COIs, local collaboration

Direct: Quote generation

Doing Good: Emotional connection through a cause



"DISCIPLINE TAKES NO VACATION"

FOUNDATIONS

CULTURE

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