

FOUNDATIONS

DAY ONE

The Five Pillars

- ☒ Systems
- ☒ Capacity
- ☒ Training
- ☒ Marketing
- ☒ Culture

The Eight Things

- ☐ Not competitive in my area
- ☐ Too many agents
- ☐ Bad contract
- ☐ Claims issues
- ☐ Service department hold times
- ☐ Internet leads don't work
- ☐ No good employees in my area
- ☐ My customers don't have money



FOUNDATIONS

DAY ONE

Agent Core Duties

- ☒ Customer Conversations
- ☒ Team Development
- ☒ Marketing
- ☒ Thinking about the business

Systems

- | | |
|--|---|
| <input checked="" type="checkbox"/> Agent Inbox Cleanup | <input checked="" type="checkbox"/> Phones |
| <input checked="" type="checkbox"/> Team Member Inbox Ownership | <input checked="" type="checkbox"/> Jabber |
| <input checked="" type="checkbox"/> Shared Folder Setup | <input checked="" type="checkbox"/> MSTeams |
| <input checked="" type="checkbox"/> Office Communications Folder | <input checked="" type="checkbox"/> List Views |
| <input checked="" type="checkbox"/> Team Member Inbox Cleanup | <input checked="" type="checkbox"/> Quote Checklist |
| <input checked="" type="checkbox"/> Shared Outlook Calendar | <input checked="" type="checkbox"/> Office Design |
| <input checked="" type="checkbox"/> Agent Inbox Management | |
| <input checked="" type="checkbox"/> Create Custom Rules | |
| <input checked="" type="checkbox"/> Team Email Redirects | |
| <input checked="" type="checkbox"/> SF Connect | |

