

FOUNDATIONS DAY TWO

AGENT SAMPLE SCHEDULE

For MOAs: Rotate weekly Monday, Tuesday, Wednesday

Monday	9:00-9:45	Training (Rotating between offices)
	10:00-11:30	Networking Meeting
	11:30-12:30	Lunch Meeting
	12:30-1:00	Compliance/System Adherence
	1:00-3:00	Sales/Service Training
Tuesday	8:00-9:30	Networking Meeting
	9:45-10:00	Meeting Preparation
	10:00-11:30	Marketing/Production Meeting (All Offices)
	11:00-12:00	Appointments
Wednesday	10:00-3:00	Appointments (5 per day, 20/month)
Thursday	8:00-10:00	Administration
	10:00-2:00	Appointments (4 per day, 16/month)
	2:00-4:00	Sales Training/Interviews
	4:00-EOD	Prioritize personal relationships
Friday		Personal Day



FOUNDATIONS DAY TWO

TEAM STRUCTURE

AGENT



KEY

- CCR Customer Care Representative
- AR Account Representative
- MA Marketing Associate
- CR Contact Representative



FOUNDATIONS DAY TWO

CUSTOMER CARE

- Retention – 4Rs
- Claims
- Customer Care Folder
- SFConnect
- Beginning of day
- General Service
- Reinstatements

CUSTOMER CARE

THE 32 POINT DAY

1 point each: Inbound calls and walk-ins

3 points each: Customer Conversation or 4R appointments
in-person or on Good Neighbor Connect



FOUNDATIONS DAY TWO

ACCOUNT REPRESENTATIVE

- Five Step Customer Experience
- Quote and Onboarding Checklist
- Customer Conversations*
- GIOs
- After-Hours Quotes
- Call-Ins and Walk-Ins
- State-to-State
- In-Book Marketing Lists
- Self-Prospects
- Referrals
- Direct Connects
- Internet Leads

ACCOUNT REPRESENTATIVE

- Five Applications *OR*
- Six Household Quotes *OR*
- Outbound call quota

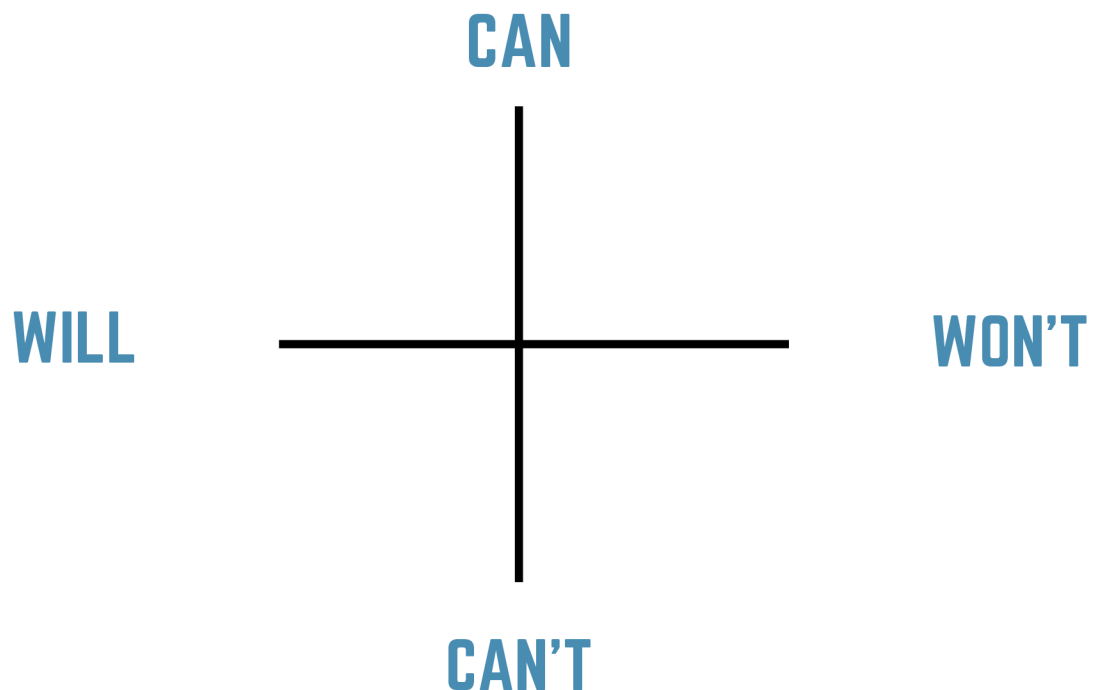


FOUNDATIONS DAY TWO

3P GRAPH



2T GRAPH



FOUNDATIONS DAY TWO

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"DISCIPLINE TAKES NO VACATION"

