

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



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This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

TROPHY CLUB CONSULTING LLC
"DISCIPLINE TAKES NO VACATION"

