

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 | |

