

FOUNDATIONS DAY TWO

AGENT SAMPLE SCHEDULE

For MOAs: Rotate weekly Monday, Tuesday, Wednesday

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

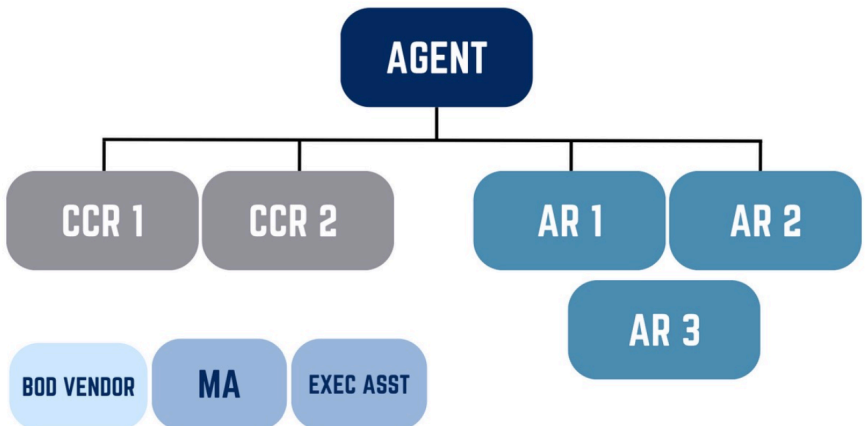


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FOUNDATIONS DAY TWO

ORGANIZATIONAL CHART



KEY

CCR CUSTOMER CARE REPRESENTATIVE

AR ACCOUNT REPRESENTATIVE



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FOUNDATIONS DAY TWO

CUSTOMER CARE

- Retention - 4Rs
- Claims
- Customer Care Folder
- SFConnect
- Beginning of Day
- General Service
- Reinstatements
- 32 Point day

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 GNC)



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FOUNDATIONS DAY TWO

32 POINT DAY

9-10AM	15 MINS	15 MINS	15 MINS	15 MINS
10-11AM	15 MINS	15 MINS	15 MINS	15 MINS
11AM-12PM	15 MINS	15 MINS	15 MINS	15 MINS
12-1PM	15 MINS	15 MINS	15 MINS	15 MINS
1-2PM	15 MINS	15 MINS	15 MINS	15 MINS
2-3PM	15 MINS	15 MINS	15 MINS	15 MINS
3-4PM	15 MINS	15 MINS	15 MINS	15 MINS
4-5PM	15 MINS	15 MINS	15 MINS	15 MINS



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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
- Six household quotes
- Six of eight hours validated with one of the following: Household quotes, appointments to close, 40+ outbound calls.

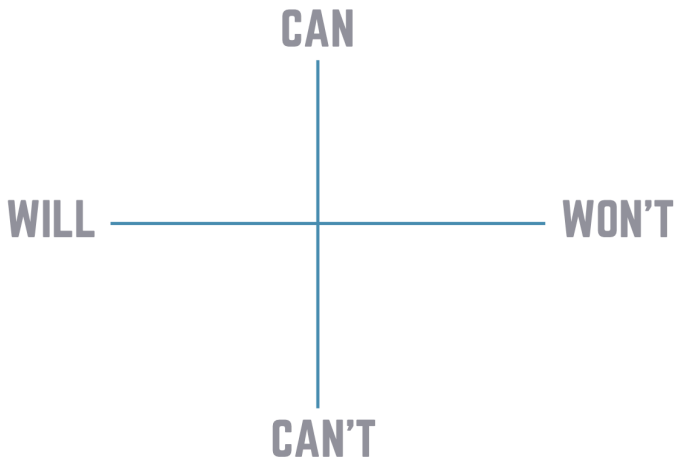


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FOUNDATIONS DAY TWO

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