

FOUNDATIONS DAY ONE

THE EIGHT THINGS



- Not competitive in my area.
- Too many agents.
- Bad contract.
- Claims issues.
- Our service department's hold times are too long.
- Internet leads don't work.
- No good employees in my area.
- My customers don't have money.

THE FIVE PILLARS

- Systems
- Capacity
- Training
- Marketing
- Culture

SYSTEMS

- Agent inbox management.
- Agent inbox cleanup.
- Create custom rules.
- Outlook calendar.
- Shared folder setup.
- Team inbox ownership.
- Team inbox cleanup.
- Communications folder.
- Microsoft teams.
- SF connect.
- Jabber.
- Phones.
- List views.
- Quote checklist.



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"DISCIPLINE TAKES NO VACATION"



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IN PERSON EVENTS

- In Person Boot Camp - Miami, Florida July 24th
- Agent Summit - September 8, 2025 - September 10, 2025

RECORDINGS



- Elevate: Salesforce and Prioritization
- Elevate: Quote and Onboarding Checklist
- Elevate: Internet Lead Process
- Evolve: August 4, 2025 - August 6, 2025 - LIVE

UPCOMING CLASSES

Quick Hit: Understanding Medicare & Supplement - July 17th

Elevate: All Things MOA - July 17th

Evolve II Service: July 21st

Quick Hit: Overcoming Common Objections - July 23rd

Quick Hit: Working Premium Decreases - July 30th

Elevate: Finding Top Talent - July 31st

Evolve: August 4th - August 6th

Quick Hit: Why Fitness is Crucial to Your Success

(Featuring Hunter Wyant) August 6th



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