

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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FOUNDATIONS - DAY ONE

IN-PERSON EVENTS

In-Person Boot Camp: Philadelphia, PA - Dec. 3rd

In-Person Boot Camp: West Palm Beach, FL - Dec. 9th-10th

RECORDINGS

Elevate: Term Life Insurance Portfolio Explained

Elevate: Universal Life Strategies

Elevate: Finding To Talent

Elevate: All Things MOA

Elevate: Life for Business Owners

UPCOMING CLASSES

Quick Hit: The 3 P's - Nov. 12th

Elevate: Salesforce and Prioritization - Nov. 13th

Evolve II Service (November) - Nov. 17th - 19th

Quick Hit: Leveraging Gratitude - Nov. 19th

Elevate: Coaching With Intention - Nov. 20th

Quick Hit: No Quick Hit - Nov. 26th

Evolve: (December) - Dec. 1st - 3rd

Quick Hit: Building Value In Homeowners - Dec. 3rd

Evolve II Sales (December) - Dec. 8th - 10th

Quick Hit: Positioning Personal Articles - Dec. 10th



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This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on its right side, suggesting it's resting on a surface.



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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
	10:00-10:45	Marketing/Production Meeting
	11:00-3:00	Appointments (4 per day, 16 per month)
Wednesday	10:00-3:00	Appointments (5 per day, 20 per month)
Thursday	8:00-10:00	Administration
	10:00-2:00	Appointments (4 per day, 16 per month)
	2:00-4:00	Sales Training/Interviews
	4:00-EOD	Prioritize personal relationships
Friday		Personal Day



FOUNDATIONS - DAY TWO

ORGANIZATIONAL CHART

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FOUNDATIONS - DAY TWO

CUSTOMER CARE

THE 32 POINT DAY



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



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FOUNDATIONS - DAY THREE

RECRUITING AND HIRING

Virtual Interview

Recruiting Visit

Candidate Review

Offer

Licensing

Start Date



FOUNDATIONS - DAY THREE

THE FOUR PART MARKETING PLAN

Branding

Direct Marketing

Passive Marketing

Doing Good/Community Events



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