



TROPHY CLUB CONSULTING

FOUNDATIONS LEARNERS GUIDE

TROPHY CLUB CONSULTING LLC





DISCLAIMER

Trophy Club Consulting is a privately-owned company that is not affiliated or endorsed in any way by State Farm.



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

FOUNDATIONS DAY ONE



In-Person Events

- ❖ Agent Summit - April 20-22, 22-24
- ❖ Agent Summit - June 1-3, 3-5

Upcoming Classes

(All classes Eastern Time)

- ❖ January 12-14 - Foundations (12:00PM-2:00PM)
- ❖ January 14 - Quick Hit (10:30AM-10:45AM)
- ❖ January 15 - Elevate (1:00PM-2:00PM)
- ❖ January 19-21 - Evolve II Service (10:30AM-10:45AM)
- ❖ January 21 - Quick Hit (10:30AM-10:45AM)
- ❖ January 22 - Elevate (1:00PM-2:00PM)
- ❖ January 28 - Quick Hit (10:30AM-10:45AM)

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



Customer Care

The 32 Point Day

FOUNDATIONS DAY TWO



Account Representative

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FOUNDATIONS DAY TWO



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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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ADDITIONAL NOTES



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