



TROPHY CLUB CONSULTING

EVOLVE II SERVICE 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.



CUSTOMER CARE WINNING THE DAY



Core Duties

The 32 Point Day

Daily Schedule

CUSTOMER CARE EFFICIENCY



Customer Care Folder

Automation

Texting

Directing Traffic

Online Enrollment/App

Voicemail

BEGINNING OF DAY TASKS



Prioritize

Rate Decreases

Rate Increases

Company Cancellations

Payment and Billing

NOTE- TAKING



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4R SERVICE RECOVERY



Keys to Success

The 4Rs

Reading the C

PIVOTING & IDENTIFYING OPPORTUNITIES



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MANAGING YOUR DAY



Prioritization

Time Blocks

High vs. Low Value

ADDITIONAL NOTES



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ADDITIONAL INFORMATION



Upcoming Classes

(All classes Eastern time)

- ❖ January 21 - Quick Hit (10:30AM-10:45AM)
(Controlling What You Can Control)
- ❖ January 22 - Elevate (1:00PM-1:30PM)
(Utilizing ECRM to Write More Business)
- ❖ January 28 - Quick Hit (10:30AM-10:45AM)
(Coaches Open Q&A)
- ❖ February 3-5 - Evolve (1:00PM-4:00PM)
- ❖ February 4 - Quick Hit (10:30AM-10:45AM)
(Term Conversions)
- ❖ February 11 - Quick Hit (10:30AM-10:45AM)
(Cleaning Up Existing Households)

Trophy Club Links



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LEAVE US A
GOOGLE REVIEW

