



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 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



Office Daily Schedule

8:00AM - 8:15AM: Team Leader Huddle

8:15AM - 8:25AM: Customer Care Team Prioritization

8:15AM - 8:45AM: Account Representative Training Time

8:45AM - 9:00AM: Account Representative Team Prioritization

9:00AM - 10:00AM: Power Hour

10:15AM - 11:00AM: Account Representative Admin

11:00AM: Customer Care Team Prioritization Check-In

Lunch: Assign Time

3:00PM - 4:00PM: Second Power Hour

3:00PM: Customer Care Team Prioritization Check-In

4:00PM: Account Representative Check-In

FOUNDATIONS DAY THREE



Recruiting and Hiring

Virtual Interview

Recruiting Visit

Candidate Review

Offer

Licensing

Start Basic Training

FOUNDATIONS DAY THREE



The Four Part Marketing Plan

Branding

Direct Marketing

Passive Marketing

Doing Good/Community Events

ADDITIONAL NOTES



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