

Foundations **WORKSHEET**



Four Part Marketing Plan

Branding

Direct

Passive

Community

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Trophy Club Curriculum

Elevate

Quick Hits

Evolve

Evolve II Sales

Evolve II Service

Foundations

Basic Training

Team Precision

Agent Summit

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Training

Upcoming Elevates

Elevate - Uncovering Customers' Needs - July 23
Elevate - Utilizing ECRM to Write More Business - July 30
Elevate - Presenting Multiline Based on Need - August 6
Elevate - Complete Onboarding Process - August 13
Elevate - Tactics for Fall Life - August 20
Elevate - Customer Care To Life - September 3
Elevate - Working Lead List - September 10
Elevate - Compensation and Incentives - September 17

Recorded Elevates

Elevate - Turning Leads Into Quotes
Elevate - A-Z Life Appointment Process
Elevate - Five Things Whole Life Does
Elevate - Term Life Explained
Elevate - Outside Marketing
Elevate - Sales Team Job Duties
Elevate - Customer Care Job Duties
Elevate - Total Accountability
Elevate - Systems for an Efficient Office
Elevate - Utilizing ECRM to Write More Business
Elevate - New Hire Training Plan
Elevate - The Internet Lead Process
Elevate - 2026 In-Book Marketing Plan
Elevate - 100 Application Development Plan
Elevate - Utilizing The Quote and Onboarding Checklist
Elevate - Maximizing Trophy Club

Upcoming Quick Hits

Quick Hit - The Importance of the Sales Matrix - July 22
Quick Hit - Positioning Supplemental Health Insurance- July 29
Quick Hit - Open Q&A - August 05
Quick Hit - Key Homeowners Endorsements - August 12
Quick Hit - The Triangle of Protection - August 19
Quick Hit - Overcoming Common Objections - August 26

Upcoming Evolve

Evolve (August) August 17 - 19

Upcoming Evolve II

Evolve II Service July 27 - 28
Evolve II Sales August 24 - 25

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Upcoming Events

Run with the Bulls- IPS Conference

August 31st - September 1st, Fort Lauderdale, FL

Agent Summit- Get Your Custom Business Plan!

October 12th - October 14th, Charlottesville, VA

Team Precision- with Sara Labraaten

Register online at www.trophyclubconsulting.com

Trophy Club Links



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