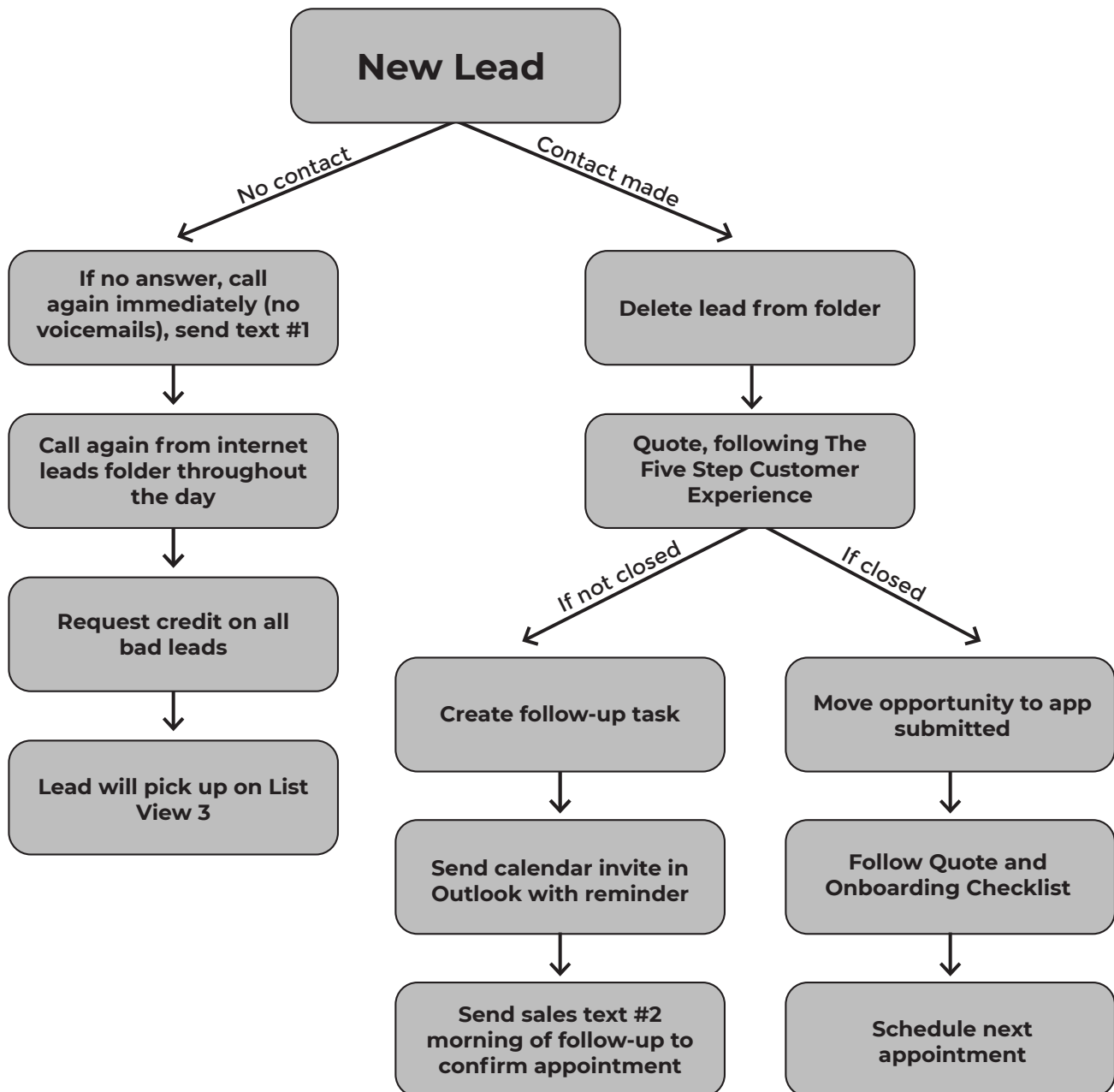


ELEVATE WORKSHEET



Working Lead List



ELEVATE WORKSHEET



The Internet Lead Process

New Lead Process

- ❖ Lead comes in
- ❖ Lead is moved to internet lead folder and auto-forwarded to Account Reps
- ❖ Account Rep. Replies All to email, "Got It"
- ❖ Send sales text #1
- ❖ Call lead (no voicemails)

No Contact

- ❖ If no answer, call again immediately (no voicemails), send text #1
- ❖ Call again from internet leads folder throughout the day (min 3PM Power Hour)
- ❖ Request credit when appropriate (see vendor requirements)
- ❖ Lead will pick up on List View 3

Contact Made

- ❖ Delete lead from folder
- ❖ Quote, following The Five Step Customer Experience
- ❖ If not closed:
 - ☐ Create follow-up task
 - ☐ Send calendar invite in Outlook with reminder
 - ☐ Send sales text #2 morning of follow-up to confirm appointment
- ❖ If closed:
 - ☐ Move opportunity to app submitted
 - ☐ Follow Quote and Onboarding Checklist
 - ☐ Schedule next appointment



ELEVATE WORKSHEET



Supplemental Information

Creating Custom Folder

- ❖ Open Mail > right-click on Shared Folders (on the left side of the screen) > New Folder > Name the folder Internet Leads > Enter

Creating Custom Rule

- ❖ Open Mail > Choose the three dots at the far right on the headings bar > Rules > Create Rule > Advanced Options
- ❖ From the Rules Wizard, find the condition that will identify the message to be handled by the rule. (i.e., when a message arrives from email@email.com)
- ❖ Select the condition by clicking its checkbox > Next
- ❖ Choose “forward to” and included emails for account reps
- ❖ Choose “move to folder” and select “Internet Leads”
- ❖ Click next, main rule (i.e., “New Internet Lead”) > Check “Turn on this rule” > Finish

Text Templates

1. Hey XXXXX, I look forward to saving you money on your insurance. What time works for you? [TM Name], [Agent Name] [Agency Name].
2. Hey XXXXX, I look forward to our meeting at 3pm on Tuesday the 12th. [TM Name], [Agent Name] [Agency Name].



ELEVATE WORKSHEET



Sample Follow-Up Task

FORM:

Works at XYZ company, been there 11 years, married to Amanda, 2 kids, Johnny (7) and Marie (3), spends time outside and travels, planning to go to Grand Canyon in June 2027

Auto:

XYZ \$135/month, 100/300/100, 500D, 500G, H; quoted 100/300/100, 0D, 1000G, H, R - \$142

Fire:

No renters insurance, quoted \$30k property, \$300k liability, \$5k med with water/sewer backup - \$9.50

Life:

Quoted 10 year term \$125k benefit for \$23.10, customer declined

Health:

Quoted STD, \$450 benefit, 1 year benefit, 30 day elimination for \$7.21 to cover car payment

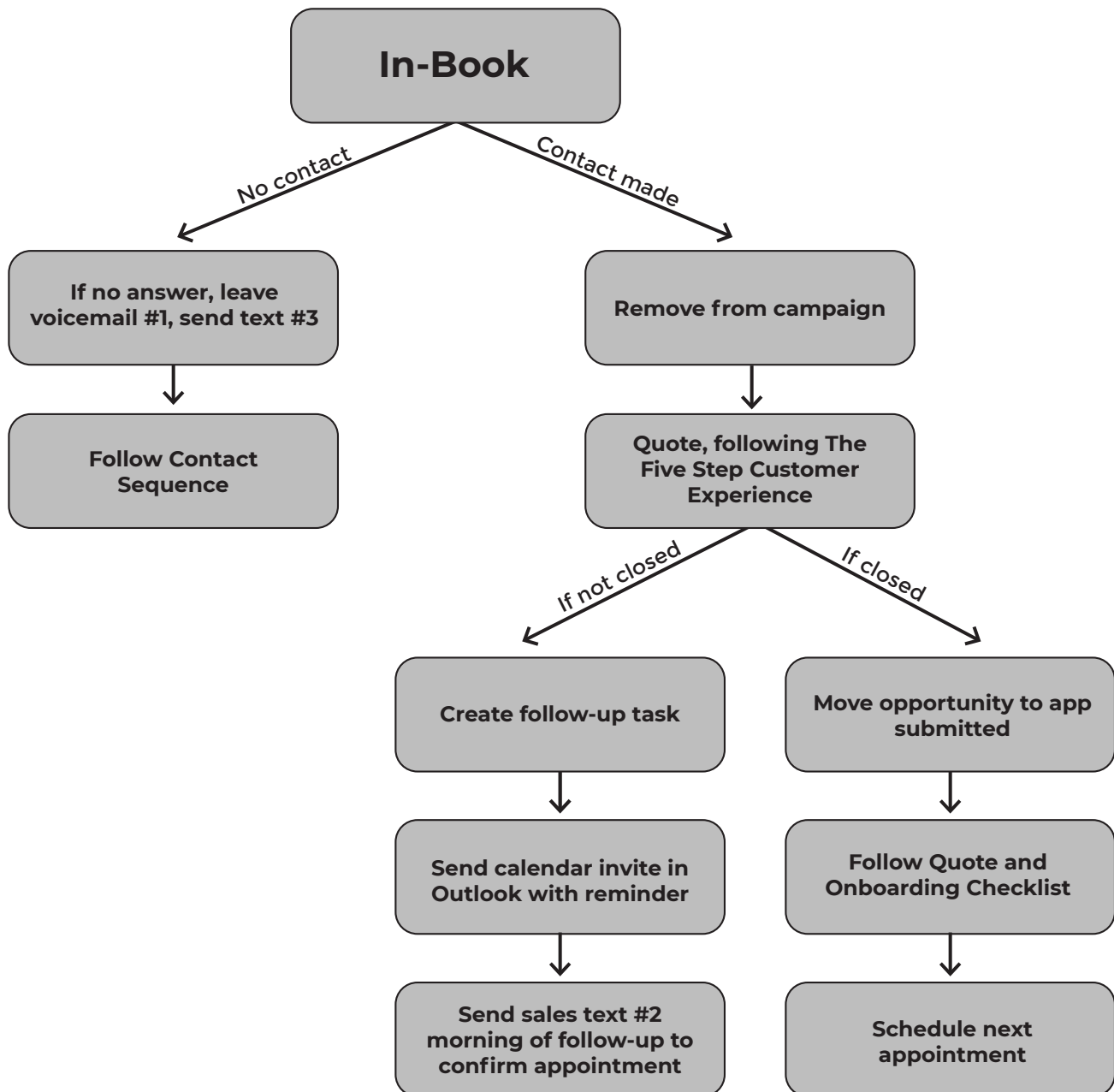
Follow-up set for ticket falling off in 3 months



ELEVATE WORKSHEET



In-Book Lead List



ELEVATE WORKSHEET



Supplemental Information (cont.)

Text Templates (cont.)

3. Hey XXXXX, We need to review a few items related to your account, let us know a time that works. [TM Name], [Agent Name] [Agency Name].

Voicemail Template

1. "Good afternoon XXXXX, this is [Name] calling from [Location], hope your morning is going well. I saw a couple of things on your account that I wanted to bring to your attention. I'm also going to send you a text, if you could just respond back to that text and let me know a good time to connect. I look forward to speaking with you. Talk soon, thank you."

	M	T	W	T	F
WK 1	1	2	3	4	X
WK 2	1	2	3	4	X
WK 3	5	6	7	8	X
WK 4	5	6	7	8	X

** 200 households per representative per month**



ELEVATE WORKSHEET



Upcoming Classes

- ❖ September 14-16: Foundations
- ❖ September 14-16: Evolve
- ❖ September 17: Quick Hit - Leveraging FORM Conversation
- ❖ September 18: Elevate - Compensation and Incentives
- ❖ September 23: Quick Hit - Starting Your Day Strong
- ❖ September 28-29: Evolve II Service

Trophy Club Links



FOLLOW US
ON FACEBOOK



FOLLOW US
ON LINKEDIN



FOLLOW US
ON INSTAGRAM



LEAVE US A
GOOGLE REVIEW



TROPHY CLUB CONSULTING LLC

07