

Inspire a Nation Business Mentoring "FIX MY INSURANCE AGENCY" Workshop Agenda

The primary goal of Inspire a Nation Business Mentoring and the Fix My Insurance Agency workshop is to mentor your insurance agency on how to add \$10 Million in revenue to the agency in the next 3 - 5 years. That can only happen if you follow an assembly line approach to growing your agency.

Below are the stations on the assembly line.

**Note: All training times are CENTRAL TIME! Please adjust based on your local time zone.
(Example: 9 AM Central = 10 AM Eastern, 8 AM Mountain, 7 AM Pacific)**

ONLINE FIX MY INSURANCE AGENCY WORKSHOP AGENDA

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Day 1 TRAINING STATIONS

STATION ONE:

9:00 AM – 9:50 AM

Introduction, Training Goals Explained, Reviewing the Basics of Why we are in the Insurance Industry, Determining How Many Cold and Warm Leads the Agency Needs to Reach Its Sales Goals

STATION TWO:

10:00 AM – 10:50 AM

Establishing Recommended Agency Coverage Standards, Role-Play the Possible Consequences When a Customer Declines the Agency's Recommended Coverage.

STATION THREE:(Cont'd)

11:00 AM – 12:00 PM

Calendar Blocking the 14 Core Weekly Agency Tasks and Processes

LUNCH: 12:00 PM – 1:00 PM

STATION FOUR:

1:00 PM – 1:50 PM

Using the Endorsement Process to generate new business and increase retention

85% of all incoming calls and emails in an insurance agency are some form of endorsement or policy change request.

Admin focused tasks such as the Endorsement Process can be time and sales quicksand in an insurance agency. Suppose the agency does not have a defined process and accountability standards that make admin and service work revenue-producing tasks; in that case, admin tasks will become time and sales quicksand.

STATION FIVE:

2:00 PM – 2:50 PM

Using the Claims Process to increase referrals, life insurance, and increase retention.

STATION SIX:

3:00 PM – 3:50 PM

Selecting Staff KPIs

KPIs or Key Performance Indicators are the foundation of getting the best results from agency staff, tools, and resources.

STATION SEVEN:

4:00 PM – 4:50 PM

How to pay, bonus, and commission agency team members

DAY 2 TRAINING STATIONS

STATION EIGHT:

9:00 AM – 9:50 AM

Marketing Tools Necessary to Build a \$10 Million Insurance Agency

This session overviews the various marketing tools every agency should have in place when building a \$10 Million Insurance Agency. Tools include Google Tools and Services, P.E.T.S. with Video Tools (Phone, Postal Mail, Email, Text Messaging, and Video), and Search Engine Optimization Tools.

STATION NINE:

10:00 AM – 10:50 AM

The First 10 Recommended Marketing Campaigns to Build a \$10 Million Insurance Agency

This session deep dives into the 5 Best Insurance Prospects and the 10 Main Marketing Methods to reach them.

STATION TEN:

11:00 AM – 12:00 PM

Setting Up a Real-World Marketing Campaign!

No More Theory . . . In Real-Time, I will help one of the agency's attending the Online Workshop set up an active marketing campaign.

LUNCH: 12:00 PM – 1:00 PM

STATION ELEVEN:

1:00 PM – 1:50 PM

The New Customer Onboarding Process:

The agency did a lot of marketing and lead follow-up to get a new customer; now, you have to properly onboard them!

The way you onboard a customer will establish the foundation of the entire relationship. An excellent new customer process will increase premium, increase policies, increase retention, increase referrals, and make customer service more efficient.

STATION TWELVE:

2:00 PM – 2:50 PM

The Retention Workflow Process

Retention is the wealth-building foundation of an insurance agency. It is more than re-quoting to find a lower price. This session looks at preparing and reviewing customer records for an upcoming renewal, requesting updated information from customers to verify loss runs, worker's comp info, employee salaries, etc.

STATION THIRTEEN:

3:00 PM – 3:50 PM

How to buy or sell an insurance agency

This training will overview what an agency needs to do to prepare to acquire another agency and what an agency leader needs to do to prepare to sell or merge the agency.

STATION FOURTEEN:

4:00 PM – 4:50 PM

Final Q & A and Close

After two days of training, demonstrations, and implementation, you will have questions. The workshop's final station will allow you to ask what you and every other workshop attendee have on their notepad or in their head.