



## Course Syllabus – How to Build a \$10 Million P&C Insurance Agency in 5 Years (It is easier than you think)

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<b>Mentoring sessions: 5</b> <b>General Synopsis</b>	<p>This 5 week mentoring session will cover every aspect of running an insurance agency including:</p> <p>Each mentoring session includes a sales, service, prospecting, marketing, admin, and retention component.</p> <ul style="list-style-type: none"><li>• Daily tasks and activities that should occur in the agency</li><li>• The top marketing and prospecting campaigns that really work (Based on the tracking of 100's of thousands of conversations, phone calls, online clicks, emails, postal mailings, etc.)</li><li>• How to generate low cost leads using the internet, social media, and GPS devices</li><li>• Hiring and on-boarding agency staff</li><li>• Service conversations and tasks</li><li>• Retention Processes: Rate increase calls, policy reviews</li><li>• Technology Tools: Drip email, text messaging, website chat, agency management tools,</li><li>• Tracking and accountability practices and tools, and more</li></ul> <p>If it happens in a property and casualty insurance agency, you can bet it will come up during this 5 week session.</p> <p>Our intent is to make this the most comprehensive mentoring ever provided to property and casualty insurance agents and their staff.</p>
<b>Day/Time:</b>	<b>Wednesday's, 2 PM Eastern, 1 PM Central, 12 PM Mountain, 11 AM Pacific</b>
<b>Session Length: 90 Min, Session Dates</b>	<b>May = 20 &amp; 27</b> <b>June = 10, 17, 24</b>



<b>Main Objectives:</b>	During this 5 week web mentoring session Dr. Williams and the Inspire a Nation team will introduce, reintroduce, demonstrate, role play, and answer your questions on the best tasks, processes, conversations, and tools you need to grow your insurance agency.
<b>Material needed:</b>	<b>Computer (or Go To Meeting App on a your smart phone), 90 minutes of uninterrupted time (As much as possible), Inspire a Nation provided course material(downloadable during the session), webinar call-in phone number (If you are on the webinar portion of the mentoring session and you call in by phone, the instructor can un-mute and talk to you to answer your questions), Inspire a Nation members: Please log in to the video library prior to the start of the session, as many agency staff as possible attending the mentoring session, pen or pencil, notebook, open mind!</b>
<b>Logistical requirements:</b>	Go to Webinar log on and call-in information

Session Topic	Key Processes and Tasks
<b>SESSION 1: LAYING THE RIGHT FOUNDATION FOR THE AGENCY</b>	<p>STAFF ACTIVITY CHECKLIST – SELECT THE RIGHT TASKS AND PROCESSES FOR YOUR AGENCY</p> <p>DAILY/WEEKLY/MONTHLY/ANNUAL TASKS CALENDAR</p> <p>PRODUCTION FORECAST/PRODUCTION REVIEW MEETING - IDENTIFYING AND TRACKING THE PROSPECT</p> <p>MAXIMIZING SERVICE CALLS – ROLE PLAY OF UP-SELLING AND CROSS-SELLING DURING THE ENDORSEMENT PROCESS</p> <p>ENDORSEMENT WORKFLOW - TOOLS YOU NEED TO USE DURING AN ENDORSEMENT</p> <p>Q &amp; A</p>
<b>SESSION 2: MARKETING AND PROSPECTING IN THE AGENCY</b>	<p>TOP PRODUCING MARKETING CAMPAIGNS FOR A CAPTIVE AGENCY (P&amp;C)</p> <p>TOP PRODUCING MARKETING CAMPAIGNS FOR AN INDEPENDENT AGENCY (P&amp;C)</p> <p>TOP PRODUCING LIFE INSURANCE/FINANCIAL SERVICES MARKETING CAMPAIGNS (ALL AGENCY TYPES)</p>



	<p>TOP PRODUCING CAMPAIGNS FOR COMMERCIAL INSURANCE (ALL AGENCY TYPES)</p> <p>25 WAYS TO GENERATE LOW COST WEB AND INTERNET LEADS</p> <p>SOCIAL NETWORKING IN THE AGENCY</p> <p>MAIL AND EMAIL MARKETING RESPONSE RATES (<i>TEMPLATES, TRACKING CODES AND PHONE NUMBERS</i>)</p> <p>Q &amp; A</p>
<p><b>SESSION 3: NEW CUSTOMERS, TECHNOLOGY, AND TELEMARKETING IN THE AGENCY</b></p>	<p><b>MAXIMIZING THE NEW CUSTOMER RELATIONSHIP</b> – REFERRALS, LIFE INSURANCE, TESTIMONIALS, E-SIGNATURES, PREPARING A NEW CUSTOMER FOR A POLICY REVIEW (CPR POST CARD)</p> <p><b>AUTOMATION</b> – AGENCY MANAGEMENT TOOL, DRIP EMAIL, TEXT MESSAGING, HOOTESUITE SOCIAL NETWORKING TOOL</p> <p><b>TELEPHONE PROSPECTING</b> – THE BEST TELEMARKETING LISTS, THE BEST TELEMARKETING TOOLS, OUTSOURCING SOME OF THE AGENCY’S TELEMARKETING, TELEMARKETING TRACKING TOOLS AND PROCESSES</p> <p>ROLE PLAY OF THE NEW CUSTOMER PROCESS, ROLE PLAY OF A COLD CALL TELEMARKETING CALL</p> <p>FOLLOW UP TIMES AND TASKS ON THE DAILY SCHEDULE</p> <p><b>Q &amp; A</b></p>
<p><b>SESSION 4: RETAINING CUSTOMERS AND RETAINING GOOD STAFF MEMBERS</b></p>	<p>LOCATING, INTERVIEWING, AND ON-BOARDING NEW STAFF, ROLE PLAY OF A STAFF INTERVIEW</p> <p>POLICY REVIEWS – CREATING AN AGENCY POLICY REVIEW PROCESS, RATE INCREASE CALLS,</p> <p>ROLE PLAY OF A RATE INCREASE CALL AND POLICY REVIEW</p> <p>CANCELLATION/TERMINATION PROCESS</p> <p>Q AND A</p>
<p><b>SESSION 5: PUTTING IT ALL TOGETHER, SESSION Q &amp; A</b></p>	<p>WE WILL TAKE THE DAILY/WEEKLY/MONTHLY/ANNUAL CALENDAR AND WALK THROUGH THE VARIOUS PROCESSES, TASKS,</p>



	CONVERSATIONS, AND TOOLS DISCUSSED ON THE PREVIOUS 4 SESSIONS
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**Instructor: Dr. Billy R. Williams, PhD**

**President – Inspire a Nation Business Mentoring**

**Course materials for active Inspire a Nation Business Mentoring Members will be available on the \$10 Million Agency session page of our website and inside of the Video and Document Library ([www.inspireanation.org](http://www.inspireanation.org))**

**Non Inspire a Nation Members: Selected (not all course materials) course materials will be available on the \$10 Million Agency session page of our website**

**Please send all comments and questions to [helpdesk@inspireanation.org](mailto:helpdesk@inspireanation.org)**