



# Inspire a Nation Business Mentoring “FIX MY INSURANCE AGENCY” Workshop Agenda

## The Night Before The Workshop

7:00 pm to 9:00 pm	<b>Registration/Meet and Greet</b>
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## Workshop Day 1

8:00 am to 8:30 am	<b>Remote Webinar Attendee Sign On</b>
8:30 am to 9:50 am	<b>Weekly Tasks Calendar Setup Introduction to the 23 Core Agency Processes and the 14 Core Weekly Tasks Automation and Technology Checklist</b>
10:00 am to 10:50 am	<b>Endorsement and Claims Process</b>
11:00 am to 12:00 pm	<b>8 Primary Marketing Campaigns Set Up</b>
12:00 pm to 1:30 pm	<b>Lunch and Idea Sharing (Lunch Not Provided)</b>
1:30 pm to 2:20 pm	<b>8 Primary Marketing Campaigns Set Up (cont'd)</b>
2:20 pm to 2:30 pm	<b>Break</b>
2:30 pm to 3:20 pm	<b>Production Forecasting &amp; Lead Management Set Up</b>
3:20 pm to 3:30 pm	<b>Break</b>
3:30 pm to 5:00 pm	<b>Continuation of Best Practice Processes and Automation and Technology Set Up (Q&amp;A)</b>

<b>7:00 pm to 9:00 pm</b>	
<b>Technology Set Up</b>	In Hotel Lobby or a designated location if event is sponsored

<b>Workshop Day 2</b>	
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8:30 am to 9:30 am	<b>New Customer Process</b>
9:30 am to 10:50 am	<b>Customer Policy Review and Rate Increase Process</b>
10:50 am to 11:00 am	<b>Break</b>
11:00 am to 12:00 pm	<b>Staffing the Agency (Locating, Interviewing, Onboarding, Paying)</b>
<b>12:00 pm to 1:00 pm</b>	<b>Lunch/Idea Sharing</b>
1:00 pm to 1:50 pm	<b>Automation and Tech Set Up and Best Practices</b>
1:50 pm to 2:00 pm	<b>Break</b>
2:00 pm to 3:00 pm	<b>Life Insurance/Financial Products (Best Practices)</b>

3:00 pm to 3:30 pm **Preparing for Taxes/P&L Statement**

3:30 pm to 4:30 pm **Closing Q & A on Automation and Best Practices**

The FIX MY INSURANCE AGENCY™ workshop is conducted and hosted by Inspire a Nation Business Mentoring – [www.inspireanation.org](http://www.inspireanation.org) (A Williams Family Investment Group Company)

To register and see more details, visit: [www.fixmyinsuranceagency.com](http://www.fixmyinsuranceagency.com)

