

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

## The Night Before the Workshop

7:00 pm to 9:00 pm	Registration/Meet and Greet in the hotel lobby
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## Workshop Day 1

7:00 am to 8:00 am	<b>Breakfast – Hotel or Local Restaurants (Not Provided by Inspire a Nation)</b>
8:00 am to 8:30 am	<b>Webinar Attendees Sign-On</b>
8:30 am to 9:00 am	<p><b>CTIS - IMPLEMENTING A PROCESS</b></p> <ul style="list-style-type: none"> <li>● Checklist and Workflows</li> <li>● Technology Tools</li> <li>● Implementation Steps</li> <li>● Spot Checks</li> </ul> <p><b>EACH PROCESS AND TASK IN AN AGENCY SHOULD HAVE ONE OR MORE OF FIVE OUTCOMES</b></p> <ul style="list-style-type: none"> <li>● Increase Premium</li> <li>● Increase Policies</li> <li>● Increase Retention</li> <li>● Increase Referrals and Testimonials</li> <li>● Make Customer Service More Efficient</li> </ul>
9:00 am to 9:50 am	<p><b>DETERMINE THE NUMBER OF COLD AND WARM LEAD NEEDED TO REACH YOUR ANNUAL SALES GOALS</b></p> <ul style="list-style-type: none"> <li>● Prior year’s number of leads, quotes, and sales</li> <li>● Cold Lead Formula</li> <li>● Warm Lead Formula</li> <li>● Establish sales goals for 2020</li> <li>● 5 Best Prospects</li> <li>● 10 Main Marketing Methods</li> </ul>
10:00 am to 12:00 pm	<p><b>SET UP THE FIRST TEN MAIN TECHNOLOGY TOOLS</b> Identify the current Agency Management System, Rater, and Phone System</p> <ol style="list-style-type: none"> <li>1. E-Business Card (Switchit or Evaunt.me)</li> <li>2. Bitly or Rebrandly Link Shortener</li> <li>3. Email Templates</li> </ol>

	<ol style="list-style-type: none"><li>4. Trigger Based Drip Email Sequence in the Agency Management System (<b>If the AMS does not have a drip sequence send the email manually or use a 3rd party tool</b>)</li><li>5. Text Message Tool</li><li>6. Declined Coverage Form</li><li>7. Appointment Scheduling Tool</li><li>8. E-Signature Tool</li><li>9. Video Recording Software</li><li>10. Password Management Tool</li></ol>
<b>12:00 pm to 1:15 pm</b>	<b>Lunch and Idea Sharing (Lunch Not Provided)</b>
<b>1:15 pm to 5:00 pm</b>	<b>SET UP THE FIRST 8 CORE MARKETING CAMPAIGNS</b> <b>LEAD FOLLOW UP AND MANAGEMENT (PET A2 Prospecting Method)</b>

**Workshop Day 2**

<b>7:00 am to 8:00 am</b>	<b>Breakfast – Hotel or Local Restaurants (Not Provided by Inspire a Nation)</b>
<b>8:00 am to 8:10 am</b>	<b>Webinar Attendees Sign-On</b>
<b>8:10 am to 12:00 pm</b>	<b>IMPLEMENT THE 14 CORE WEEKLY PROCESSES</b> <b>(Determine the agency’s categorizing and labeling standards)</b>  <ol style="list-style-type: none"><li>1. New Customer Onboarding Process</li><li>2. Endorsement Process</li><li>3. Claims Process</li><li>4. Policy Review Process</li><li>5. Rate Increase Process</li><li>6. Agency Leader Spot-check Process</li><li>7. Business Referral Partner Campaigns</li><li>8. Birthday Process</li><li>9. Emergency Contact Process</li><li>10. Production Forecast Process</li><li>11. Cancelation/Termination Process</li><li>12. Marketing Campaign Setup Process</li><li>13. Automation/Technology Training Process</li><li>14. Staffing Accountability/Enhanced Pay</li></ol>
<b>12:00 pm to 1:00 pm</b>	<b>Lunch Break (Lunch Not Provided)</b>
<b>1:00 pm to 5:00 pm</b>	<b>THE 14 CORE PROCESSES CONTINUED</b>

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: <https://www.inspireanation.org/Fix-My-Insurance-Agency-Info>



## **ITEMS TO BRING**

**1. Bring the total number of leads, quotes, and sales (by policy count) the agency generated in 2019.**

**(One of the first tasks will accomplish is to determine the agency's quote to close ratio and how many cold and warm leads they agency must generate to reach their 2020 sales goals.)**

**2. A staff member that will assist you with implementing processes in the agency; (Operations Manager is preferred)**

**3. A Laptop or Tablet with a power strip and Wi-Fi capabilities;**

**4. Log on and Passwords for your agency management system, marketing tools, and email tools;**

**5. A burning desire to implement the best processes available to the insurance industry in your insurance agency;**

**6. A great attitude that checks your ego at the door!**

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