

## 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)

### WORKSHOP DAY 1 TRAINING STATIONS

STATION	TITLE	TIME	SUMMARY
Station #1	Opening Remarks	9:00 AM – 9:50	Introduction, Training Goals Explained, 4 Types of Discipline, \$10 Million Assembly Line, Maslow’s Hierarchy Carriers, Niches, Products Agency Math Formulas
Station #2	Setup and demonstration of Core Technology Tools	10:00 AM – 10:50 AM	From Email Templates to Instant Messaging to Computer Monitoring Software, this session covers the technology tools insurance agencies needs to use when staff is working from home or remote

Station #2 (Cont'd)	Setup and demonstration of Core Technology Tools	11:00 AM – 12:00 PM	Station #2 (Cont'd)
Lunch	Lunch	12:00 PM – 1:00 PM	Lunch

**DAY 1 STATIONS CONT'D**

STATION	TITLE	TIME	SUMMARY
Station #3	5 Best Insurance Prospects, 10 Main Marketing Methods	1:00 PM – 1:50 PM	We will overview the best marketing campaigns to reach each of the 5 best insurance prospects
Station #4	Generating a prospect list, Lead Tracking Methods, and Tools	2:00 PM – 2:50 PM	We will discuss the best ways to generate or purchase a prospect list as well as methods and tools for lead tracking
Station #5	Selecting Staff KPIs	3:00 PM – 3:50 PM	KPIs or Key Performance Indicators are the foundation of getting the best results from agency staff, tools, and resources
Station #6	How to pay, bonus, and commission agency team members	4:00 PM – 5:00 PM	How to pay, bonus, and commission agency team members
Evening Support	Additional Day 1 Assistance	7:00 PM – 9:00 PM	Inspire a Nation team members, as well as vendors, will be on hand for additional assistance and implementation support

**DAY 2 TRAINING STATIONS**

<b>STATION</b>	<b>TITLE</b>	<b>TIME</b>	<b>SUMMARY</b>
<b>Station #7</b>	<b>How to locate, interview, hire, and onboard agency staff members</b>	<b>9:00 AM – 9:50 AM</b>	<b>Our memberships provide an Employee Handbook, Staff Training Guide, Staff Activities Checklist, and other resources to help with Staffing, Training, and Accountability.</b>
<b>Station #8</b>	<b>The New Customer Onboarding Process</b>	<b>10:00 AM – 10:50 AM</b>	<b>An excellent new customer process will increase premium, increase policies, increase retention, increase referrals, and make customer service more efficient.</b>
<b>Station #9</b>	<b>The Endorsement Process</b>	<b>11:00 AM – 12:00 PM</b>	<b>Admin focused tasks such as the Endorsement Process can be time and sales quicksand in an insurance agency if the agency does not have a defined process and accountability standards</b>
<b>Station #10</b>	<b>The Claims Process</b>	<b>1:00 PM – 1:50 PM</b>	<b>The Claims Process should be more than just a touchpoint, it should be a process that will increase premium, increase policies, increase retention, increase referrals, and make the customer feel informed, safe, and protected.</b>

<b>Station #11</b>	<b>The Retention Workflow Process</b>	<b>2:00 PM – 2:50 PM</b>	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.
<b>Station #12</b>	<b>The Customer Policy Review Process</b>	<b>3:00 PM – 3:50 PM</b>	A good policy review process should be a process that not only protects the agency from an E&O complaint, but increases premium, increases policies, increases retention, increases referrals, and adds value to the customer/agency relationship.
<b>Station #13</b>	<b>How to buy or sell an insurance agency</b>	<b>4:00 PM – 4:50 PM</b>	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 with another agency.
<b>Station #14</b>	<b>Closing Q and A</b>	<b>4:50 PM – 5:20 PM</b>	Closing Q and A

## Final Q & A and Close

After two days of training, demonstrations, and implementation, you will have questions. The final station of the workshop will allow you to ask the questions that not only you but every other Fix My Insurance Agency Online Workshop attendee has on their notepad or in their head.

To register for the workshop visit <https://www.inspireanation.org/eventcalendar>



**Note: Your agency must be an active Inspire a Nation paid member to participate in the Online Fix My Insurance Agency Workshop!**

# A Huge Thank You Goes Out to Our Sponsors!

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