



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

## SUNDAY 10/28/2018

7:00 pm to 9:00 pm	Registration/Meet and Greet
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## MONDAY 10/29/2018

8:00 am to 9:00 am	Continental Breakfast
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9:00 am to 10:50 am	<b>Automation and Technology Set Up</b> <b>Manual/Semi-Automated/Fully Automated</b>
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10:50 am to 11:00 am	Break
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11:00 am to 12:00 pm	Social Networking Profile and Marketing Campaigns Set Up
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12:00 pm to 1:30 pm	Lunch and Idea Sharing
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1:30 pm to 2:20 pm	Production Forecasting & Lead Management Set Up
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2:20 pm to 2:30 pm	Break
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2:30 pm to 3:20 pm	New Customer/Endorsement/Claims Process Set Up
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3:20 pm to 3:30 pm	Break
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3:30 pm to 4:30 pm	<b>Estate Planning/Succession Planning</b>
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## TUESDAY 10/30/2018

8:30 am to 9:30 am	Creating Referral Campaigns (Customer & Referral Partners)
9:30 am to 10:50 am	<b>Automating Core Agency Processes</b>
10:50 am to 11:00 am	Break
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>Customer Retention (Automation and Best Practices)</b>
1:50 pm to 2:00 pm	Break
2:00 pm to 2:30 pm	Life Insurance/Financial Products (Best Practices)
2:30 pm to 3:00 pm	Premium Fund Trust Accounts
3:00 pm to 3:30 pm	Preparing for Taxes/P&L Statement
3:30 pm to 4:30 pm	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)