



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

SUNDAY 1/27/2019

7:00 pm to 9:00 pm **Registration/Meet and Greet**

MONDAY 1/28/2019

7:00 am to 8:30 am **Breakfast – Hotel or Local Restaurants (Not Provided by Inspire a Nation)**

8:30 am to 10:50 am **Webinar Attendees Sign-On
Automation and Technology Set Up**

10:50 am to 11:00 am **Break**

11:00 am to 12:00 pm **Social Networking Profile and Marketing Campaigns Set Up**

12:00 pm to 1:30 pm **Lunch and Idea Sharing (Lunch Not Provided)**

1:30 pm to 2:20 pm **Production Forecasting & Lead Management Set Up**

2:20 pm to 2:30 pm **Break**

2:30 pm to 3:20 pm **New Customer/Endorsement/Claims Process Set Up**

3:20 pm to 3:30 pm **Break**

3:30 pm to 5:00 pm **Continuation of Automation and Technology Set Up
(Q&A)**

TUESDAY 1/29/2019

8:30 am to 9:30 am	Estate and Succession Planning Web Meeting
9:30 am to 10:50 am	Creating Referral Campaigns (Customer & Referral Partners)
10:50 am to 11:00 am	Break
11:00 am to 12:00 pm	Staffing the Agency (Locating, Interviewing, Onboarding, Paying)
12:00 pm to 1:00 pm	Lunch/Idea Sharing
1:00 pm to 1:50 pm	Customer Retention (Automation and Best Practices)
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	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 (A Williams Family Investment Group Company)

To register and see more details, visit: www.fixmyinsuranceagency.com

