



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

SUNDAY 11/11/2018

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

MONDAY 11/12/2018

8:00 am to 9:00 am **Networking - Coffee**

9:00 am to 10:50 am **Automation and Technology Set Up
Manual/Semi-Automated/Fully Automated**

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**

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 4:30 pm **Automation and Technology Set Up (Q&A)
Manual/Semi-Automated/Fully Automated**

TUESDAY 11/13/2018

8:30 am to 9:30 am	Creating Referral Campaigns (Customer & Referral Partners)
9:30 am to 10:50 am	Automating Core Agency Processes
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	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