TOP 1%

AGENCY GROWTH CHECKLIST

BEST NEW BUSINESS PRACTICES FROM THE INDUSTRIES TOP 1%

CUSTOMER NAME

SOURCE (what is the source of this business?)

AGENT OF RECORD

- [ ] **Check to see if the client and needed info is already in Better Agency.**
  Avoid replicating work and check first if your new prospect is already in Better Agency. Read over notes and see if there is any insight you can gain from seeing any past interactions

- [ ] **Check to see if the client already has a quote file in your rater**

- [ ] **Enter/update info in the comparative for a quote**

- [ ] **Create a "package" quote for the customer with the best option**
  The best agents never quote only one line of business. They are always upselling the benefits of having multiple policies

- [ ] **Create a video proposal that highlights the benefits**
  Show your face and the proposal and always explain the policy benefits

- [ ] **Send an email with the quote attachments and video proposal**
  Always assume the close in every video proposal and email that is sent out.

- [ ] **Move them to "Quote Sent" in the sales pipeline of Better Agency**
  Moving the quoted prospect to “Quote Sent” will cause the automatic “closing” campaigns to start. This is where you will automatically follow up with each prospect until they are ready to buy.

- [ ] **Double check to make sure we have the clients phone and email correct**
  Owning all of the information is critical to your future lead generation and automation campaigns

- [ ] **Correctly list the "source" of the new business in Better Agency**
  Knowing where your business is coming from at scale will allow you to focus your time on the most profitable sources of business

- [ ] **Attach quote to the customer file in Better Agency**

- [ ] **Add note in customer file recapping the quote amounts**
  In the event another agent needs to pick up where you left off, make sure to leave notes and a copy of the video proposal in the “notes” section of Better Agency

- [ ] **Create a task to call the client/referral partner 24 hours later (Optional)**
  If the new client was referred to you, make sure to call the person who sent them and thank them

- [ ] **Issue policies**

- [ ] **Verify an existing policy does not need to be canceled**
  Verify that there is no other in-house policy to cancel

- [ ] **Send application and any needed signed forms to client**

- [ ] **Move the client to the "Won" stage in Better Agency**
  This will trigger the “New Client Welcome” automation campaign for more Google reviews

- [ ] **Add to any appropriate cross selling campaign**
  If you were unable to close multiple lines of business on the first try, make sure to add them to the right cross selling campaigns in Better Agency where they will be sent texts and emails automatically

Congratulations on earning the new business.
Only by completing these agency best practices will you earn a spot in the top 1% of all agency owners.

This list was compiled after diligently consulting with some of the countries most profitable and successful agency owners