

Multiline Insurance Agency Producer Roles

RETENTION Expert

(P&C Order Taking & Retention)

PRIORITY #1

- Service & Maintain Book
- Happy Clients, Minimal Lapses
- Auto-Pilot (Low Maintenance)

RETAIN



SUCCESS EQUALS

- 12.5% Lapse Rate (8 Year Clients)
- Pays the Base Salaries & Bills
- Owner Manages 1 Day per Week
- Most Profitable Part of Business
- Provides Long Term Job Stability

P&C GROWTH Expert

(Solicit P&C Sales & Leads)

PRIORITY #2

- Solicit Quality Sales
- Educate the Client Well
- Avoid Costly Business

GROW



SUCCESS EQUALS

- 20% Lapse Rate on New Business
- Pivot to Fire from Auto
- Work Leads & Centers of Influence
- AVOID Price Only Business
- Grow Owner's Business

MULTILINE Expert

(Multiline Reviews & Sales)

PRIORITY #3

- Generate & Do Reviews
- Multiline Existing Clients
- Retain Through Relationship

MULTILINE



SUCCESS EQUALS

- 20% Multiline Sales Ratio
- 1,800 Households + New Clients
- 20 FULL Client Reviews per month
- 5 Life, 5 Health & 5 Bank Monthly
- Hit Owner's Scorecard