



PRESENTS

## **“328% Sales Increase in 90 Days”** **(Without Spending a Dime on Advertising)**

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*Discover How To Quickly and Permanently Hardwire a Proven  
Profit-Performance System Into Your Agency DNA*

SPECIAL PRESENTER

**BRANDON SCOTT MINOR**

*CCHC, CHRS, CPMC, CRMC, CWCA, CWCC, MCCH*

# INTERACTIVE WEBINAR STUDY GUIDE



Congratulations on your investment in this webinar! Over the next 60 mins, you will be taking your agency to an all-new level by instituting our *Proven Profit-Performance System* – a safe, common sense approach to unleash agency profitability.

QUESTION: WHAT DO YOU HOPE TO GET OUT OF THIS WEBINAR?

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CONSIDER YOUR AGENCY WISH-LIST?

WHAT CHANGES AND SHIFTS WOULD YOU LIKE TO SEE IN YOUR AGENCY?

i.e. - I would like to find a way to say good-bye to failed producer investments, low client retention, ineffective teams, and continual day-to-day issues.

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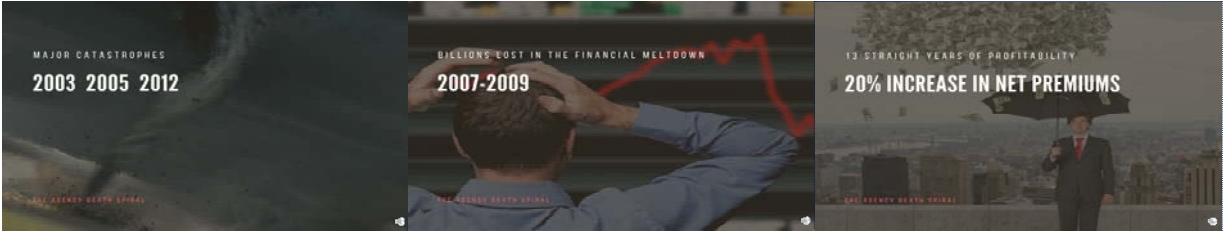
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## AGENCY DEATH SPIRAL NOTES

[illegible]

*“When agency principals proactively manage producers, the agency grows faster, makes more money, and incurs less employee related headaches.” Chris Burand*

[illegible]

ARE YOU STARTING TO DISCOVER THE VALUE OF CHANGING MODELS TO ORGANIC GROWTH?

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"In business and in life, if you can anticipate what is coming, you can overcome any obstacle placed in your path. Being able to expect problems puts you in a place of power. From this vantage point, you can create the solutions and action plans that will drive you forward, rather than reacting and getting stuck or hung up on common issues." Tony Robbins

QUESTION: ARE YOU ABSOLUTELY CERTAIN YOUR AGENCY CAN MAINTAIN GROWTH AND PROFITABILITY AS THE MARKET CHANGES? **YES/NO**

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*"The out-of-pocket costs of producer turnover is a 1:1 ratio at their salary level. A \$50,000-a-year producer costs on average \$50,000 to replace. Half of those costs being hard costs (running ads/interviews...again), the other half being soft costs (lost productivity/sales)." Don Phin*

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HOW MANY UNDER-PERFORMING PRODUCERS HAVE YOU LET GO IN THE PAST THREE YEARS?

_____	ESTIMATED COSTS \$	_____
_____	ESTIMATED COSTS \$	_____
_____	ESTIMATED COSTS \$	_____
	<b>TOTAL COSTS \$</b>	<b>_____</b>

MOST PRODUCERS ARE \_\_\_\_\_ AND UNDER-\_\_\_\_\_ WHICH IS A HUGE DRAIN ON YOUR AGENCY \_\_\_\_\_ FLOW AND \_\_\_\_\_.

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THE RESOUNDING REASON FOR CLIENTS LEAVING AN AGENCY WAS THAT  
AGENCY \_\_\_\_\_ WAS NOT GOOD ENOUGH TO JUSTIFY PAYING \_\_\_\_\_.

## IIABA Future One Survey

THE SEVEN REPORTS YOU SHOULD PULL:

1. \_\_\_\_\_ REPORTS
2. \_\_\_\_\_ PER \_\_\_\_\_
3. \_\_\_\_\_ DATA
4. AGENCY \_\_\_\_\_ REPORTS
5. CUSTOMER \_\_\_\_\_ DATA
6. PRODUCER \_\_\_\_\_
7. \_\_\_\_\_ VALUE OF \_\_\_\_\_

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THE INDUSTRY AVERAGE FOR CSR ACTIVITIES IS \_\_\_\_\_ TO \_\_\_\_\_ PER DAY.

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IT COST \_\_\_\_\_ TIMES AS MUCH TO ATTRACT A NEW CLIENT,  
THAN TO KEEP AN \_\_\_\_\_ ONE.

\_\_\_\_\_% OF AGENCIES HAVE A GREATER FOCUS ON CUSTOMER \_\_\_\_\_  
VS. \_\_\_\_\_% THAT FOCUS ON CUSTOMER \_\_\_\_\_.



**STEP ONE:** WAS ASKING THE PERSONAL LINES TEAM TO \_\_\_\_\_ THEIR \_\_\_\_\_.

YOU WILL ALWAYS SEE A SPIKE IN \_\_\_\_\_ BECAUSE OF THE \_\_\_\_\_ EFFECT.

**REMEMBER, SUCCESS LEAVES CLUES.** THE BEST WAY TO FORESEE POTENTIAL PROBLEMS  
IS TO MODEL THOSE WHO HAVE ALREADY BEEN DOWN THE PATH YOU'RE TAKING.

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**STEP TWO:** CONDUCT A \_\_\_\_\_ WORKSHOP.

**STEP THREE:** CREATE AN AGENCY \_\_\_\_\_.

**STEP FOUR:** \_\_\_\_\_ INDIVIDUAL \_\_\_\_\_

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EVERY WEEK WE HELD \_\_\_\_\_ ONE-ON-ONES CALLED  
\_\_\_\_\_.

THESE WEEKLY MEETINGS ALLOWED US TO EXECUTE ON THE AGENCY MAP  
BY LINKING \_\_\_\_\_, \_\_\_\_\_ AND \_\_\_\_\_ GOALS  
TO \_\_\_\_\_ AND \_\_\_\_\_ ACTIONS.

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## FIVE WEEK RESULTS

POLICIES PER MONTH \_\_\_\_\_

\_\_\_\_\_% OF CLIENTS WERE ADDING COVERAGE AND UPPING LIMITS

\_\_\_\_\_% OF CLIENTS WERE UPDATING EMAIL, CELL PHONES & SOCIAL MEDIA

## TWELVE WEEK RESULTS

\_\_\_\_\_ NEW POLICIES WERE ADDED WHICH REPRESENTED A \_\_\_\_\_% INCREASE

(HOW MUCH REVENUE WOULD \_\_\_\_\_ NEW POLICIES MEAN TO YOU?)

\_\_\_\_\_ POLICIES SAVED AND CLIENT ATTRITION WENT FROM \_\_\_\_\_PPM TO \_\_\_\_\_PPM

(ADD \_\_\_\_\_ ADDITIONAL POLICY REVENUE TO YOUR TOTAL)

## NINE MONTH RESULTS

\_\_\_\_\_% INCREASE IN CLIENT TRANSACTION VALUE

(DO YOU KNOW WHAT YOUR CLIENT TRANSACTION VALUE CURRENTLY IS?)

\_\_\_\_\_% INCREASE IN ORGANIC ONLINE TRAFFIC WHICH RESULTS IN  
A SAVINGS OF \$ \_\_\_\_\_ IN ADVERTISING COSTS.

ADVERTISING BUDGET \$ \_\_\_\_\_ CUT IT IN HALF  
= \$ \_\_\_\_\_ ADDITIONAL FUTURE CASH FLOW



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Have this ready for our coaching call!

## JAY ABRAHAM'S THREE WAYS TO GROW YOUR AGENCY

1. INCREASE THE NUMBER OF CLIENTS
2. INCREASE THE AVERAGE TRANSACTION VALUE
3. INCREASE THE FREQUENCY OF REPURCHASE – GET MORE RESIDUAL VALUE OUT OF EACH CUSTOMER

### INCREASE AGENCY SMALL COMMERCIAL BY 33% IN 12 MONTHS

INCREASE THE NUMBER OF CLIENTS	INCREASE AVERAGE TRANSACTION VALUE	INCREASE THE FREQUENCY OF REPURCHASE	TOTAL REVENUE
1000 CLIENTS	\$400	1	\$400,000
REFERRAL SYSTEMS	IMPROVE SALES SKILLS	DEVELOP BACK END PRODUCTS	
INCREASE SALES SKILLS	INCREASE FEE PRICING	ENDORSE OTHER PRODUCTS	
DELIVER LEGENDARY SERVICE	UP-SELL HIGHER LIMITS OR ADDITIONAL COVERAGES	DELIVER LEGENDARY SERVICE	

### INCREASE AGENCY SMALL COMMERCIAL BY 33% IN 12 MONTHS

INCREASE THE NUMBER OF CLIENTS	INCREASE AVERAGE TRANSACTION VALUE	INCREASE THE FREQUENCY OF REPURCHASE	TOTAL REVENUE
1000 CLIENTS	\$400	1	\$400,000
5% INCREASE	15% INCREASE	10% INCREASE	
1050 CLIENTS	\$460	1.102	\$532,266
DELIVER LEGENDARY SERVICE	INCREASE FEE PRICING	ENDORSE OTHER PRODUCTS	

## FILL IN THE BLANKS WITH YOUR AGENCY'S CURRENT NUMBERS

Increase the #  
of customers

X

Increase the  
average \$ per sale

X

Increase the  
freq of repurchase = Total

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## **BRANDON SCOTT MINOR**

CEO & Co-Founder of People Chief

[Scott@PeopleChief.com](mailto:Scott@PeopleChief.com)

With a unique combination of 20 professional designations, ranging from risk management to human dynamics, Scott has the uncanny ability to make the complex, simple and to teach with contagious enthusiasm.

As a 15-year former agency owner, Scott has worked in the agency trenches selling and developing producers and agency practices. As a coach, he has worked and partnered with some of the most influential people and organizations in the country, including Power Brokers, Top 25 Agencies, Government Officials, and leadership teams from Fortune 100 companies.

Scott's energy and desire to give back to the insurance industry are unmatched. His innovative thinking propels him to tackle challenges with a burning desire to not settle for the status quo. This quality is particularly evident in his study and application of leadership development and performance, determining what holds individuals and teams back, identifying the root causes of conflict and miscommunication, and studying and practicing how people can give and receive feedback more effectively.

When not working, Scott enjoys spending time with his family, traveling, and giving back to his community. Scott is currently one of the top ranked Titleist Performance Institute golf professionals in the Midwest; coaching a Drive, Chip, & Putt Finalist, Jr. Masters Champion, John Deer Classic, Youth Classic, Optimist and Hurricane Major Winners. Scott resides in Columbia, Missouri with his wife Ashley, sons Sean and Brett, and daughter Siena.