Agency Checklist

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-Dickson Insurance Agency, LLC

| Daily Checklist | | | | | | | | |  | | Top Marketing Strategies | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| To Do… | Mon | Tue | Wed | Thu | Fri | Reviewed | Complete |  | | 1. ***Renewal/Cross-Sell:*** Review daily, rewrite any NextGen home policies into Smart Home. Look for x-sell on monoline. 2. ***Foremost/Bristol Renewals:*** Look for rewrite opportunities. Also review all non-Farmers renewals. 3. ***Top 100/Natural Market:*** Work Top 100, make daily calls to at least two people you know. 4. ***Facebook (Personal-Biz):*** Pull "insurance" on Facebook posts, send "Happy B-Day messages", update. 5. ***Inactive List.*** Send mass mailer in February. 6. ***X-Dates:*** Ask each client if we can re-quote in six months and x-date every auto/home quote. Enter premium & date, if possible. 7. ***Google Reviews:*** Get VIP client to do one view per week on Google | |
| Review Dickson Agency E-mails |  |  |  |  |  |  |  |  | |
| Review Dickson Firm E-mails |  |  |  |  |  |  |  |  | |
| Update Agency Zoom, Quote Board and Sales |  |  |  |  |  |  |  |  | |
| Update Google Calendar & Microsoft To-Do |  |  |  |  |  |  |  |  | |
| Review commissions & banking |  |  |  |  |  |  |  |  | |
| Review QuickBooks |  |  |  |  |  |  |  |  | |
| Review Marketing |  |  |  |  |  |  |  |  | |
| Review Facebook and update Business page |  |  |  |  |  |  |  |  | |
| Send Happy Birthday messages |  |  |  |  |  |  |  |  | |
| Follow-up on all new claims |  |  |  |  |  |  |  |  | |
| Review notifications |  |  |  |  |  |  |  |  | |
| Review renewals for cross-sell, discounts, and rewrites |  |  |  |  |  |  |  |  | |
| Send Thank You sales texts |  |  |  |  |  |  |  |  | |
| Hold Morning Staff Meeting |  |  |  |  |  |  |  |  | |
| Call two people on Natural Market list |  |  |  |  |  |  |  |  | |
| Complete two quotes per day min. **(goal of 5)** |  |  |  |  |  |  |  |  | |
| Mail Thank You cards |  |  |  |  |  |  |  |  | |
| Recap quotes at end of day |  |  |  |  |  |  |  |  | |
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