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

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| 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 |[x] [ ] [ ] [x] [ ] [ ] [ ]   |  |
|  |  |  |  |  |  |  |  |  |  |