Agent Daily Checklist

Dickson Insurance Agency, LLC

| Daily Checklist |  |  Top Marketing Strategies |
| --- | --- | --- |
| To Do… | Mon | Tue | Wed | Thu | Fri | Reviewed | Complete |  | 1. ***Facebook (Personal-Biz):*** Search "insurance" on Facebook posts, send "Happy B-Day messages", update.
2. ***Top 100/Natural Market:*** Work Top 100, make daily calls to at least two people you know.
3. ***Renewal/Cross-Sell:*** Review daily, rewrite. Look for x-sell on monoline.
4. ***QNC/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.
5. ***Inactive List:*** Follow link on Agency Portal and call 10 people.
6. ***Google Reviews:*** Get VIP client to do one view per week on Google.
7. ***Event Marketing***: Attend a local event or host a booth.
8. ***B2B***: Visit a local business and hand out your business card.

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| Review Dickson Agency E-mails |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Review @Info E-mail |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Review Sales Report |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Check Voicemail |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Review & update Agency Zoom Lead Management  |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Review & update Agency Zoom Task Manager |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Review Renewals for cross-sell, discounts (RH & MC) |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Review Notifications @DW |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Follow-up on all new Claims @DW |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Send Thank You sales texts from previous day |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Hold Sales Staff Meeting @BD |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Call 10 people on Natural Market or sales list |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Complete two quotes per day min. **(goal of 5)** |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Make Agency Facebook post @BC |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Mail Thank You cards @BC |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Review and file daily receipts in QuickBooks @BC |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| Review Agency Sales Recap at end of day @BD |[ ] [ ] [ ] [ ] [ ] [ ] [ ]   |  |
| ***"Our goal is to offer excellent customer service and better coverage at a better price!"*** | Excellence ~ Integrity ~ Responsibility |  |  |