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. | |
| 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 | | | | | | |  | |