



High-Payoff Selling “Agency Focus” Newsletter and Resources Archives

NEWSLETTERS

Value Added Service Plans	Priority Management & High-Payoff Activities	Carrier Connections
Industry Observations	Channel (niche) Marketing	Account Rounding and Cross Selling
Choosing Opportunities and Goal Setting	Referral Harvesting	Pipeline Management
Planning	Centers of Influence (COI's)	Needs Assessments

RESOURCES

Sample Priority Management Plan (PDF)	Strategic Needs Assessment – Commercial and Personal Lines (WORD DOC)	The Simple Assessment (WORD DOC)
Sample Needs Assessment Questions for client interview (WORD DOC)	The top traits of Successful Sales and Service Teams (PDF)	Ten Steps to Referral Harvesting (PDF)
Sample Goal Planning Sheet (PDF)	12 Signs of a Healthy Agency Worksheet (PDF)	Top 10 Ways to distinguish your agency (PDF)
Differentiate Yourself, Your Agency and Your Carrier Partners (PDF)	2014 Survey Results (PDF)	

PROGRAMS

FastTrack (for producers new to the industry)
Agency Jump Start Program (for an overall “peek under the hood” analysis and to Jump Start your Sales Team)
For All Agency Programs
CSR “Beyond Expectations” Program (a comprehensive program for the service professional)
Carrier Programs (from Underwriting to Claims staff and Agency Support Programs)

RECORDED WEBINARS

The Healthy Agency: Are you there yet? with Polestar’s CMO and author, Bob Teschke
<https://www1.gotomeeting.com/register/812920297>

High-Payoff Recruiting and Hiring for Sales Professionals SDI Staffing's Julie Brown

<https://www1.gotomeeting.com/register/874704280>

Coach, Train, & Retain for High Performance with Polestar's Senior Coach, Julie Donn

<https://www1.gotomeeting.com/register/674616465>

A Refreshing & Unique Approach to Improving Sales Results with Steve Thompson

<https://www1.gotomeeting.com/register/599017009>