



***Power Position Your Agency: A Guide to  
Insurance Agency Success***  
**By Troy Korsgaden**

This book covers the basics for growing an agency. What follows are some of the insights shared. It is a quick read and one I recommend.

1. Break down goals into daily four-hour segments. Have no more than five or six goals and when you eliminate one, add another one to the list.
2. 100% of the ACRs have to be directed toward calling current and prospective clients to schedule, confirm, and reschedule appointments, and preparing appointment folders after appointments are set.
3. The ideal time for the ACR to contact people is from 2-5 P.M. Monday through Thursday. A good ACR can make approximately 40 calls an hour using introduction lists. The best introduction lists are the ones you create.
4. Calendaring includes:
  - A print out of appointment in the computer or on the calendar
  - Pre-appointment information forms
  - A print out of the information on the office database for current clients
  - Any information that may assist the sale (just married, referral source, etc.)
5. Employees have to be convinced that what they do and how they do it makes a positive and significant difference in the lives of the clients served.
6. Your goal is to pay employees 20% above average. Their goal is to help you be able to do that. For every dollar you spend on their salary, you should expect at least two to come back.
7. Offer incentive the employees with bonuses up to 30% of the base salary.
8. Try to make prospects come to you. The ones I can't persuade are probably the ones I don't want. Assure them that they will be in and out in 30 minutes.
9. Make sure to have a scheduled annual review with every client and also to know all their x dates.
10. Benefits of one-stop-shopping:
  - Prevents insurance gaps
  - Prevents unnecessary overages and premiums
  - Clients save time
11. ACR must confirm all appointments
12. Have a list of 100 current and potential clients to market to.
13. Make sure to have a referral reward program for all referrals.
14. Turn away price shoppers and unqualified customers.
15. Only go after clients already interested in your services so you don't have to waste your time talking about the importance of it.
16. Use simple diagrams on a white board with markers and a dry eraser. Clients like the fact you're not pulling out a one-size-fits-all chart or approach.