

# MILLION DOLLAR INSURANCE AGENCY TASKS

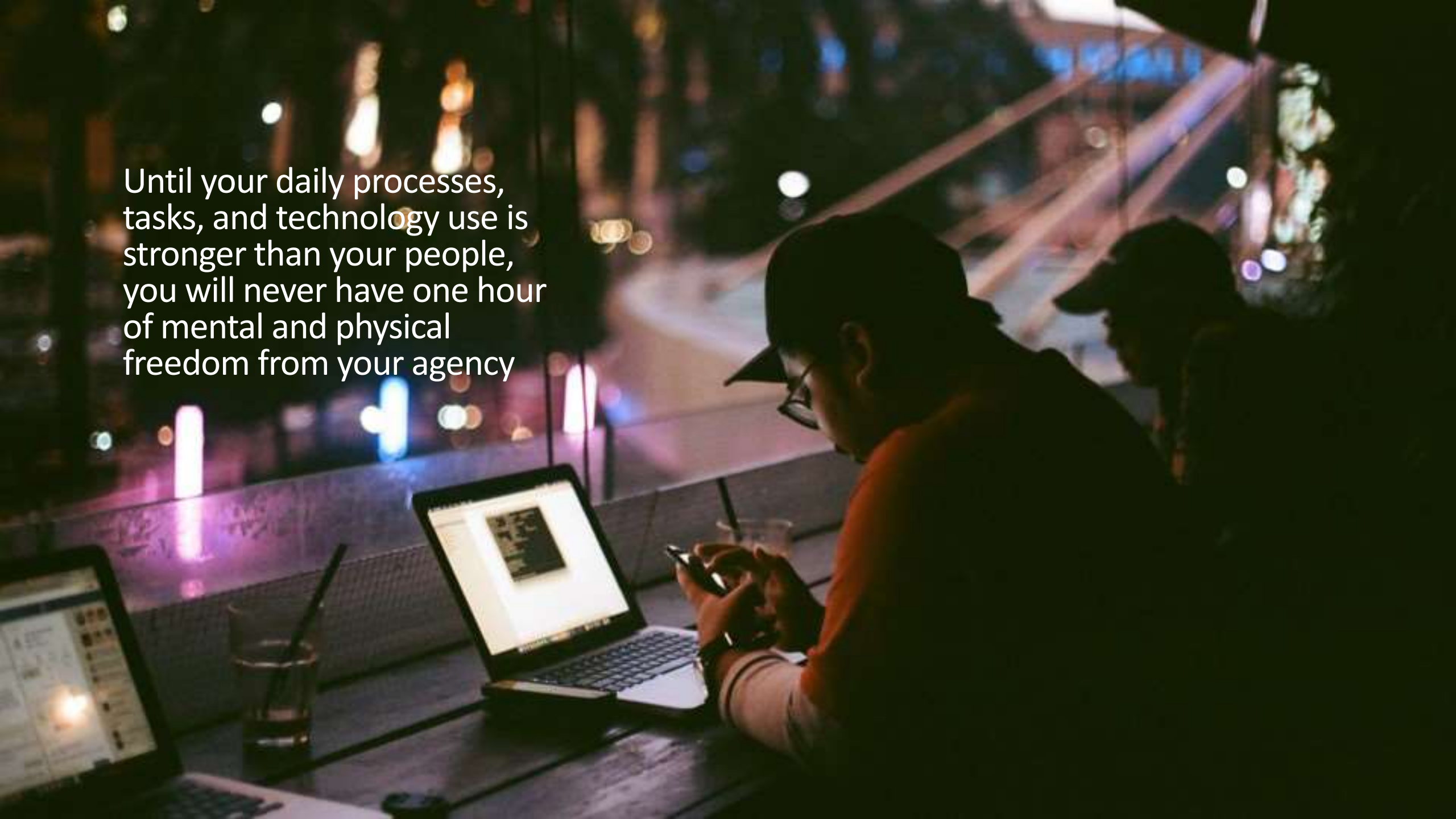
Billy R. Williams, Ph.D., President – Inspire a Nation Business Mentoring  
[www.inspireanation.org](http://www.inspireanation.org)

Insurance Agency Processes, Tasks, and Technology Use  
That Will Make or Save Your Agency \$1 Million Dollars





Until your daily processes,  
tasks, and technology use is  
stronger than your people,  
you will never have one hour  
of mental and physical  
freedom from your agency





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Technology in an  
insurance agency  
should do 6  
things



Make the gathering and transfer of important data possible and safe



Make workflows and processes more consistent to implement



Help the agency build, enhance, and maintain the business relationship with a customer



Allow the agency to have more effective and consistent communication with a prospect



Free up agency staff and resources from tasks that can be automated so they can concentrate on higher revenue producing tasks and processes



Allow the agency to generate and download various business reports in Excel or CSV

# LET'S GET STARTED

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# # 3

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## Agency Management System

# # 2

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## Operations Manager





# #1 Agency Processes

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Clearly Defined

Consistently Implemented

Regularly Spot-Checked



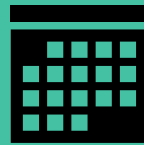
## Local SEO



Local Search Results  
(e.g. insurance Los Angeles)



Voice Search for local businesses



Google My Business Listing with  
Click to Call feature



70% response rate for prospects and leads compared to less than 10% for voicemail and email

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MMS allows you to send and receive pictures and videos

Have the contact text you first!

Keep an accurate record of all text communication with customers and prospects

## BUSINESS TEXT MESSAGE TOOL

# Trigger Generated Emails

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Confirmation Emails

Policy Review Request

Birthday Wishes

Upcoming X-Date



# CHATBOTS

## STILL IN THE 36 MONTH VALIDATION WINDOW





# CHATBOTS

STILL IN THE 36 MONTH RESEARCH WINDOW

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New Technology has made a chatbot easy to create and cheap

Can guide simple conversations and interactions

Can gather contact information from interested prospects

Can guide existing customers to carrier service portals

Can be used to guide contacts to videos and other lead magnets



# YOUTUBE

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Add a link to an agency introduction video on the various email templates the agency uses

2<sup>nd</sup> Largest search engine in the world

Add a city, state, and year to your video title

Use relevant keywords and key phrases in your tags

Have clear and concise call-to-actions in your video footage



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Lead Magnets can be:  
Videos,  
Forms,  
Checklist,  
Recorded Messages,  
Inbound Text Message  
Campaigns

## LEAD MAGNETS



# ELECTRONIC BUSINESS CARDS

Billy's E-Business Card = [bit.ly/bw\\_e\\_bizcard](http://bit.ly/bw_e_bizcard)

**Insurance - Billy Williams**



**Inspire a Nation Business Mentoring**  
President/CEO

3901 Highlands Blvd Suite 200  
Arlington  
TX 76018 United States

[www.inspireanation.org](http://www.inspireanation.org)



Inspire a Nation

 682-206-3836 >

 682-206-3836 >

 682-206-3836 >

 [billy@inspireanation.org](mailto:billy@inspireanation.org) >



# ELECTRONIC BUSINESS CARDS

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Easily add the agency's contact information into the mobile devices of prospects and customers

Increases the number of answered calls from the agency to prospects and customers

Increases the amount of referrals the agency receives

# FACEBOOK + LINKEDIN ADS w/ Geo-Fencing

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# VIRTUAL ASSISTANT

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# ZAPIER

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# APPOINTMENT SCHEDULER



Allows contacts to quickly and easily schedule appointments



98% show rate when a contact schedules their own appointment



Only allow certain types of appointment to get scheduled during specific blocks of times



# Social Network Direct Messages (DM)

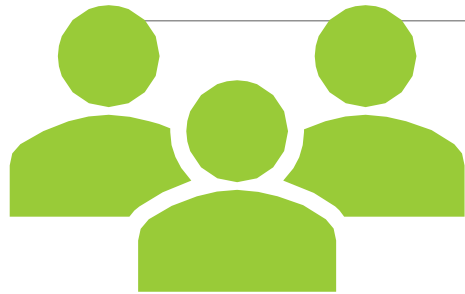
# ELECTRONIC DECLINED COVERAGE FORM



- Send each time a major coverage or policy is declined in the agency after a conversation with a customer
- Increases upsells and cross-sells by 30% in a typical agency
- E&O Protection



# Team Level



## Communication



# THANK YOU

Dr. Billy R. Williams



[www.inspireanation.org](http://www.inspireanation.org)



[Bit.ly/ianchatbot](https://bit.ly/ianchatbot)



[billy@inspireanation.org](mailto:billy@inspireanation.org)