

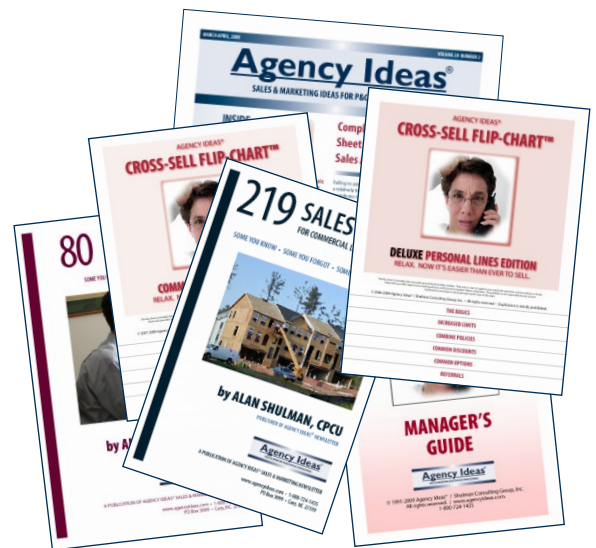
# Agency Ideas®

SALES & MARKETING IDEAS FOR P&C PROFESSIONALS

## 2010 CATALOG FOR GROWTH-MINDED P&C AGENCIES CREATIVE INSURANCE SELLING TOOLS TO HELP YOU GROW

### FEATURED GROWTH TOOLS ▶

Illustrative Insurance Sales Letters: Personal & Commercial	Page 1
Cross-Sell Flip-Charts for Personal & Commercial Lines CSRs	Page 2
Deluxe Personal Lines Cross-Sell Program	Page 2
Hiring & Managing Inexperienced Producers CD	Page 2
Producer P&L compensation and pro forma software	Page 2
Set & Track producer goal management software	Page 2
Insurance Questionnaire CD	Page 3
Revive Dead Policies CD	Page 3
80 Sales Ideas for Personal Lines CSRs mini-guide	Page 3
219 Sales Ideas for Commercial Lines Producers mini-guide	Page 3
Agency Ideas® Instant Download Store	Page 3
Agency Ideas® sales and marketing newsletter	Page 4



## ATTRACT FRESH PROSPECTS WITH ILLUSTRATIVE SALES LETTERS

**Get new prospects to contact you • Stand out from your rivals.** Illustrative insurance sales letters help you to accomplish both. Unlike ordinary text-only correspondence, our letters employ a trio of attention-grabbing elements. Oversized headlines, original color photographs, and strong sales copy all combine to motivate interested prospects to call or email your office. Each CD is packed with letters for you to edit, customize, mail-merge, and print with *Word*. Start a direct mail campaign in minutes, instead of months.

### 32 PERSONAL LINES LETTERS ▶

Select from a wide variety of auto, home, and cross-sell letters. Use the ones that best match up with your intended personal lines prospects.

#### 11 letters for attracting auto policy prospects.

8 for any type of auto • 1 each for mini-vans, pickups, and motorcycles.

#### 10 letters for attracting homeowners policy prospects.

8 for homeowners • 1 each for condo-units and renters.

#### 11 letters for cross-selling additional coverages to current clients.

- 3 letters for selling homeowners policies to auto insureds.
- 3 letters for selling auto policies to homeowners insureds.
- 1 home-based business coverage letter.
- 1 Umbrella policy letter.
- 1 Jewelry floater letter.
- 1 Fine arts floater letter.
- 1 Flood insurance letter.

**\$199**  
PER CD

**\$299**  
FOR BOTH

Only \$199 per CD.  
Only \$299 for personal & commercial.

### 32 COMMERCIAL LINES LETTERS ▶

Use innovative correspondence to stand out from agents who mail out text-only business letters.

#### 14 target-specific letters.

- Apartment buildings.
- Condo HO associations.
- Offices.
- Restaurants.
- Retail stores.
- Florists.
- Gas stations.
- Repair garages.
- Homebuilders.
- HVAC contractors.
- Landscape contractors.
- Masonry contractors.
- Painting contractors.
- Plumbing contractors.

#### 7 policy-specific letters.

- Commercial auto insurance.
- Computers and data.
- EPLI.
- Flood insurance.
- Professional liability.
- Umbrella insurance.
- Workers compensation.

#### 11 illustrative sales letters.

Designed for approaching virtually any small-to-medium sized business.

Select from a wealth of letters based on targets, policies or general business.



## CROSS-SELL FLIP-CHARTS™



**\$25**  
EACH

### ◀ 5-PAGE COMMERCIAL LINES CHART 7-PAGE DELUXE PERSONAL LINES CHART ▶

CSRs often need assistance converting routine phone calls into additional commissions and referrals. These popular charts help service reps to guide clients into buying needed endorsements, policies and more. They also remind new and veteran CSRs that their job is more than just service.

#### ◀ COMMERCIAL LINES PAGES

The flip-pages are based on account size. They provide warm-ups, ways to save money, discover what's new, enhance coverage, and add new policies.

**Artisan contractors.** Tips and inquiries tailored to small contractors.

**Small business insureds.** Questions and tips geared to other small firms.

**Larger business insureds.** Inquiries and tips for medium-sized operations.

**Red flag opportunities.** 30 red flags help CSRs spot valuable sales and referral opportunities. **The back page** provides helpful tips for retaining accounts during the prevailing market condition (either hard or soft).



**\$30**  
EACH

#### PERSONAL LINES PAGES ▶

**The basics.** 18 talking points guide CSRs through the selling process.

**Increased limits.** 15 talking points help reps to raise liability limits.

**Combine policies.** 23 talking points motivate insureds and prospects to place all of their auto, HO, and other personal lines with your office.

**Common discounts.** Lists 30 potential discounts for auto, HO, and boat.

**Common options.** Chart presents 12+ popular endorsements to suggest.

**Who, when and how to ask for referrals.** The back page of the chart lists over 20 suggestions to develop fresh sales leads.

## DELUXE PERSONAL LINES CSR CROSS-SELL PROGRAM™

This program encourages CSRs with a unique combination of bonuses, penalties, forms, sales aids, and regular meetings. You'll also find tips, flips, software, and ideas to keep it all fresh. **Develop new business** from your existing personal lines insureds. **Increase retention** through cross-selling. It more than pays off, over time. **Generate fresh referrals** for personal lines reps, commercial lines agents, and financial services personnel.

**Manager's guide**  
**3 flip-charts**  
**CD software**

Included in this time-tested program...

**24-page manager's guidebook** helps you to introduce, install, and monitor the program.

**Deluxe flip-charts** [above]. Three charts are included. Extras may be purchased.

**CD includes** Cross-Sell Calculator™ software plus 10 helpful bonus tools [details right].

**ONLY**  
**\$249**

**10 BONUS TOOLS.** These easily editable templates for *Word* include...

- **Lead Lifeline** helps in assigning fresh sales leads to specific CSRs.
- **Contact Report** urges CSRs to attempt a sale or to explain why they can't.
- **Prospect Profiler** helps reps to spot desirable leads for four key policies.
- **Rate-A-Fear** form for CSRs to identify and score their own sales fears.
- **Personal Insurance Preferences** form for new clients to complete.
- **Future Sales Evaluator** spots the top leads in your personal lines book.
- **CSR Prospect Report** for reps to complete and turn in to management.
- **Flip-Chart Introductory Memo** from management to the CSRs.
- **CSR Sales Concerns Survey** to "explain" why they can't service and sell.
- **Sample Managerial Responses** to the above survey.

**CROSS-SELL CALCULATOR™** software helps you to establish the monthly action needed from each rep, to project profits, and to output self-reporting forms that inform you of sales, referrals, and cancellations. Requires *Excel*.

## PRODUCER MANAGEMENT SOFTWARE



### HIRING & MANAGING INEXPERIENCED PRODUCERS™ BOOK & SOFTWARE CD

Hire and manage a new agent, the right way, from the start. Guidebook, templates, and software take you from the pre-hire search to management. Requires *PDF*, *Excel*, and *Word*.

**50-page PDF guidebook** walks you step-by-step through the long process of deciding to employ, locating, hiring, and managing a brand new producer. Includes practical and pointed information, ideas, and more. Helps you to use *Producer P&L™* and *Set & Track™* software [details at right].

**15 templates for Word** includes an agency marketing intern program for enticing candidates, a no-sale survey, a sales call planner, 6 sales training flash cards, and more.

**Producer P&L™** and **Set & Track™** [right] are both included on the same CD — so there's no need to purchase them separately.

**ONLY**  
**\$349**

**BOTH TITLES [BELOW] ARE INCLUDED ON THE "HIRING & MANAGING" CD.** They may also be purchased separately at the prices below.

**PRODUCER P&L™ SOFTWARE** helps you select the right compensation plan for the agency and the producer. It also projects the commissions booked and expenses paid due to the agent's employment over 5 years. And it helps you to discover the sales levels needed to generate the desired bottom line profit.

**\$199**

**\$199 when purchased separately.**

Or just purchase *Hiring & Managing* [left]. It's included.

**SET & TRACK™ SOFTWARE** helps you to establish multi-year sales plans for individual agents. Set and track goals for prospecting actions, sales, premiums, and commissions. Instantly compare the goals and tracked results for multiple years, side-by-side. The program includes a three-year tracking grid, over 30 printed and onscreen reports, and over a dozen color graphs to review during one-on-one producer sales meetings.

**\$249**

**\$249 when purchased separately.**

Or just purchase *Hiring & Managing* [left]. It's included.

## INSURANCE QUESTIONNAIRE CD

### 10 TOOLS INCLUDING AUTO & HO RENEWAL QUESTIONNAIRES.

Asking the right questions and gathering the proper facts are essential tasks. The helpful tools on this CD assist you in this task by providing valuable pre-designed sample documents. Each questionnaire may be quickly modified with *Word*. Find out what your insureds and former clients are thinking, what they own, and more. Why recreate the wheel? Save time by using the resources on this CD as your starting point. In these competitive times, you need every advantage that you can get. The **10 tools** include...

Auto and home renewal questionnaires.  
Personal & commercial client satisfaction surveys.  
Personal & commercial exit surveys.  
Collectibles and RV inquiry forms.  
Commercial lines "direction finder."  
Insurance form letter checklist.  
12-page PDF guide is also included.

ONLY  
**\$149**

Ideal companion to the *Revive Dead Policies™* CD [right].

## REVIVE DEAD POLICIES™ CD

### 26 ORIGINAL TOOLS TO HELP YOU RECOVER LOST ACCOUNTS.

You don't have to write off every personal and small business insured that you lost over the years. Generate fresh revenues from your growing collection of terminated clients. This CD has innovative tools to help. The disc is packed with creative letters, memos, cards, comparison checklists and more. Match up the resolicitation tool of your choice with your former personal or small commercial lines insured, customize, and mail. Requires Microsoft *Word*. The **26 tools** include...

5 Traditional form letters.  
3 Comparative checklists for auto, HO, and BOP.  
3 Creative memos with original photos.  
2 Postcards (5.5" x 8.5")  
4 Note cards (5.5" x 8.5").  
2 Comeback cards with 2 cover letters.  
4 Comeback "newspapers" with 1 cover letter.

ONLY  
**\$179**

6-page PDF guide is also included.

## AGENCY IDEAS® INSTANT DOWNLOAD STORE

### EXPLORE THE STORE ... [WWW.AGENCYIDEAS.COM/INSTANT](http://WWW.AGENCYIDEAS.COM/INSTANT)

#### AGENCY IDEAS® INSTANT DOWNLOAD STORE

PURCHASE & DOWNLOAD TONS OF INSURANCE SALES TOOLS

**Individual downloads include:** Sales letters, referral generation and lost policy recovery tools, surveys and questionnaires, inserts and flyers, plus sales tools for commercial producers and personal lines CSRs, life and financial services, email marketing, social media content, postcards, radio ad scripts...

**Instantly purchase and download the individual tools that you need.** The store contains a massive selection of individual tools from past issues of *Agency Ideas®* newsletter, our family of CDs, plus new items as well. Think of it as an "online vending machine" that is stocked with well over 200 creative sales and marketing tools. Thumbnail images of each item are displayed along with a brief written description, all on a series of cool "pull-down" shades.

**Agency Ideas® newsletter subscribers pay only \$12 per download.** [See page 4 for newsletter.] **Save 20% off** the regular \$15 price. Special discount code provided with your new subscription.

## MINI-GUIDES FOR PERSONAL LINES CSRS • COMMERCIAL PRODUCERS



### 80 SALES IDEAS FOR PERSONAL LINES CSRS • 16-pages • Use in combination with a flip-chart [page 2] or alone.

6 key warning signs of a possible client defection.  
10 actions to take during a buyer's major life events.  
7 signals for spotting a serious insurance buyer.  
7 ways to encourage fast auto ins. buying decisions.  
6 ways to speak positively to people.  
8 ways to make a good first impression.  
4 basic CSR selling skills.  
4 ways to see a policy that you don't yet write.  
7 preemptive cross-selling strategies.  
7 post-sale errors to avoid.  
9 new client killers to unfailingly avoid.  
5 tips for dealing with common sales objections.

### 219 SALES IDEAS FOR COMMERCIAL LINES PRODUCERS • 20-pages • Use at your desk or in the field.

22 sources of new commercial prospects.  
5 ways to find prospects in routine actions.  
5 steps to accessing a client's mini-network.  
6 tips for prospecting by voice mail.  
7 ways to identify a prospect's fears.  
6 ways to stay in touch with hesitant leads.  
1 way to prospect by proximity.  
27 ways to evaluate a new commercial lead.  
7 ways to avoid common negotiating mistakes.  
5 ways to enhance your professional image.  
38 things not to do when selling insurance.  
9 examples of features, advantages, benefits.  
10 good & bad commercial sales questions.  
7 ways to manage a prospect's stall.  
9 do's & don'ts for handling a p&c objection.  
32 tips for writing an effective "thank you".  
5 trial closes to help you test the waters.  
7 commercial insurance closing techniques.  
5 post-sale actions to reduce buyer's remorse.  
6 ways to resolicit failed commercial quotes.

#### Classic P&C sales tips.

Some you know • Some you forgot •  
Some are new to you.

Handy 8.5" x 5.5" mini-guide.

# AGENCY IDEAS® ORDER FORM

## FOUR EASY WAYS TO ORDER ▶

- CALL** • 1-800-724-1435  
**FAX** • 1-800-370-9551  
**WEB** • [www.agencyideas.com](http://www.agencyideas.com)  
**MAIL** • Agency Ideas • PO Box 3099 • Cary, NC 27519-3099

## SELECT FROM THESE TOOLS ▶

Visit our Web site...  
**[www.agencyideas.com](http://www.agencyideas.com)**  
 for complete details on each.



## YES! I WANT TO GROW MY AGENCY!

### SEND TO ▶

Agency \_\_\_\_\_  
 Name (required) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 Email (required) \_\_\_\_\_  
 Referred by \_\_\_\_\_  
 Comments \_\_\_\_\_

### PAYMENT METHOD ▶

Check enclosed payable to... "Agency Ideas"  
 Charge to my...  Amer. Express  MasterCard  VISA  
 Credit Card # \_\_\_\_\_  
 Expiration Date \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Cardholder's Name \_\_\_\_\_  
 Signature X \_\_\_\_\_

### PLEASE SEND THE FOLLOWING TOOLS ▶

**Year of Agency Ideas® newsletter** (6 issues) **\$ 116** \$ \_\_\_\_\_  
**Six-month trial subscription** (3 issues) **\$ 60** \$ \_\_\_\_\_

**Without** **With above**  
**subscription** **subscription**

#### Illustrative Sales Letters

32 personal lines letters **\$ 199** **\$ 149** \$ \_\_\_\_\_  
 32 commercial lines letters **\$ 199** **\$ 149** \$ \_\_\_\_\_  
 Both CDs (all 64 letters) **\$ 299** **\$ 249** \$ \_\_\_\_\_

#### Cross-Sell Flip-Charts for CSRs

Deluxe personal lines chart \_\_\_\_\_ @ **\$ 30** **\$ 30** \$ \_\_\_\_\_  
 Commercial lines chart \_\_\_\_\_ @ **\$ 25** **\$ 25** \$ \_\_\_\_\_

#### Deluxe PL CSR Cross-Sell Program

**\$ 249** **\$ 199** \$ \_\_\_\_\_

#### Producer Management Software

Hiring & Managing Inexp. Producers **\$ 349** **\$ 299** \$ \_\_\_\_\_  
 Producer P&L software - ONLY **\$ 199** **\$ 149** \$ \_\_\_\_\_  
 Set & Track software - ONLY **\$ 249** **\$ 199** \$ \_\_\_\_\_

#### Insurance Questionnaire CD

**\$ 149** **\$ 119** \$ \_\_\_\_\_

#### Revive Dead Policies CD

**\$ 179** **\$ 149** \$ \_\_\_\_\_

#### Mini-guides

80 Sales Ideas for Personal Lines CSRs **\$ 20** **\$ 20** \$ \_\_\_\_\_  
 219 Sales Ideas for Comm'l Producers **\$ 30** **\$ 30** \$ \_\_\_\_\_

### SHIPPING & TOTALS ▶ No shipping or tax on newsletter-only orders.

\$8 flat charge shipping via USPS Priority Mail **\$ 8**

7.75% sales tax (NC agents only) \$ \_\_\_\_\_

**TOTAL ▶ \$ \_\_\_\_\_**

## BE CERTAIN TO SUBSCRIBE TO AGENCY IDEAS® NEWSLETTER!

### FRESH SELLING IDEAS DELIVERED TO YOUR DOOR — EVERY OTHER MONTH ▶

**Grow your book with this respected print publication.** Receive original, profitable P&C sales ideas and tools every other month. Discover fresh, creative ways to increase revenues and demand for your services, to effectively prospect, cross-sell, use social media, and to close more sales.

**6 idea-packed issues per year** presenting innovative selling ideas and resources.

**Free online access** to the resource-packed *Subscribers-Only Area* [details below].

**Enjoy subscriber discounts** on above sales tools **plus 20% off every instant download.**

Password access to the exclusive **Subscribers-Only Area** on [agencyideas.com](http://agencyideas.com) is automatically included with your print subscription, at no charge. It's packed with original sales, marketing, and management tools. This unique download area contains predesigned tools like ads, flyers, and letters for you to customize and use. Plus, access the helpful *Sales Objection Bank™* and more.



**\$116**  
**A YEAR**