LSP Assessments

Contact Info | sales@idealtraits.com | 248.387.2717 | www.idealtraits.com/blueprint

Overview

IdealTraits assists agencies to attract, assess, and identify top performing LSP's and CSR's. Utilizing integrated job posting tools in conjunction with IdealTraits 92.6% valid assessments, will give you detailed information to make the right hiring decisions for your agency.

Description	Blueprint Negotiated Price	Agent Blueprint Price
IdealTraits *(2017 subscription, unlimited assessments & job posting services)*	**$798**	**$399**

What Can I Expect?

- **UNLIMITED Job Postings**
    - Post to job sites like Indeed.com, Glassdoor.com, Simplyhired.com and many more.
    - Job builder with templates.
    - Agency branded job landing page and career micro site.
    - My eSig integration of "Now Hiring" button.
- **UNLIMITED Job Sharing**
    - Share your job with social media sites like Facebook, LinkedIn, Twitter, and Google Plus.
- **UNLIMITED Assessments**
    - Identify top talent with IdealTraits 92.6% valid assessments.
    - Insurance specific.
- **Applicant Tracking System**
    - New applicant alerts and email templates.
    - Instant candidate summaries and reports.
    - Sort, filter, comment and track incoming applicants and resumes.
- **Live Chat and Phone Support**

Benefits to my Agency

- Get more applicants.
- All candidates in one place.
- Efficient hiring process.
- Confident, evidence based hiring.
- Make the best hiring decisions for your agency.
- Hire quality staff, fast.

LSP Assessments

Best Practices

- Follow the A.B.H. rule (Always Be Hiring link)
- Review the proven 10 Step Hiring Process. (link)
- Review the IdealTraits top 25 interview questions for agency hires. (Top 25 link)
- Contact our office when you need help.

Additional Resources

- Please visit http://www.idealtraits.com/blueprint for additional resources including:
- IdealTraits explainer video (1 min.)
- Blueprint offer explainer video (3 mins.)
- Product demonstration (9 mins.)
- 10 Step Hiring Process (.pdf download)
- **Early Start Offer (ESO) available for new enrollee's**
- **IdealRecruit - We Recruit. You Interview.**
    - Call 248-387-2717 for more information.

Extra Hands Business Hours Call Forwarding

Contact Info | ExtraHands@allstate.com | 855.808.7951 | Chat feature: (Mon. – Fri., 9 a.m. –7 p.m. ET)

Overview

Extra Hands leverages the talent and resources within the Allstate Customer Contact Centers to extend agency capacity and help you grow your business. Agencies can forward their phones to Extra Hands during business hours for up to 10 hours per week. Calls are handled by the Extra Hands team, made up of Allstate employees who are trained on Allstate products and services.

Six-month and twelve-month subscriptions will be offered for 2017. Prices shown below include a 25% cost share. The fee structure is based on the agency's number of Policies in Force (PIF) as of September 1, 2016.

Agency Cost for 6 Months (based on hours per month)					
	0-1,499 PIF	1,500-2,999 PIF	3,000-5,999 PIF	6,00-8,999 PIF	9,000 + PIF
1 hr/wk/6 mos	$248	$450	$675	$1,328	$2,003
2 hrs/wk/6 mos	$495	$900	$1,350	$2,655	$4,005
3 hrs/wk/6 mos	$743	$1,350	$2,025	$3,983	$6,008
4 hrs/wk/6 mos	$990	$1,800	$2,700	$5,310	$8,010
5 hrs/wk/6 mos	$1,238	$2,250	$3,375	$6,638	$10,013
6 hrs/wk/6 mos	$1,485	$2,700	$4,050	$7,965	$12,015
7 hrs/wk/6 mos	$1,733	$3,150	$4,725	$9,293	$14,018
8 hrs/wk/6 mos	$1,980	$3,600	$5,400	$10,620	$16,020
9 hrs/wk/6 mos	$2,228	$4,050	$6,075	$11,948	$18,023
10 hrs/wk/6 mos	$2,475	$4,500	$6,750	$13,275	$20,025

Agency Cost for 12 Months (based on hours per month)					
	0-1,499 PIF	1,500-2,999 PIF	3,000-5,999 PIF	6,00-8,999 PIF	9,000 + PIF
1 hr/wk/12 mos	$495	$900	$1,350	$2,655	$4,005
2 hrs/wk/12 mos	$990	$1,800	$2,700	$5,310	$8,010
3 hrs/wk/12 mos	$1,485	$2,700	$4,050	$7,965	$12,015
4 hrs/wk/12 mos	$1,980	$3,600	$5,400	$10,620	$16,020
5 hrs/wk/12 mos	$2,475	$4,500	$6,750	$13,275	$20,025
6 hrs/wk/12 mos	$2,970	$5,400	$8,100	$15,930	$24,030
7 hrs/wk/12 mos	$3,465	$6,300	$9,450	$18,585	$28,035
8 hrs/wk/12 mos	$3,960	$7,200	$10,800	$21,240	$32,040
9 hrs/wk/12 mos	$4,455	$8,100	$12,150	$23,895	$36,045
10 hrs/wk/12 mos	$4,950	$9,000	$13,500	$26,550	$40,050

Extra Hands Business Hours Call Forwarding

What Can I Expect?

- Dedicated, experienced Allstate employees
  - Each specialist is extensively trained on Allstate products, discounts and processes.
- Branded customer experience
  - Every customer interaction is branded with the agency name (E.g.: "Thank you for calling the John Smith agency").
    - **NOTE:** Automatic Number Identification (ANI) functionality through the agent's phone carrier must be working correctly for agency branding to occur. Please see "Phone Carrier Requirements" section below for more information.
- Second-look verification process
  - Extra Hands strives to provide customer support and coverage recommendations similar to the agency to help provide customers with a variety of choices so they can decide how to meet their unique needs.
  - Select transactions are taken through a "second-look" verification process to ensure accuracy and alignment with regional-specific risk management guidelines.
- Real-time reporting
  - Each call is documented and notes are available to the agent for review in real time.
  - Instant email notification of sales, quotes and follow-up requests are sent.
    - **NOTE:** Although Extra Hands attempts to service every customer need during an agent's forwarding time slot, there are some items that will still require the agent's attention. Please expect follow-up request emails for some of your forwarded phone calls.
- **NOTE:** At this time, Extra Hands has **very limited bilingual capabilities**. Please consider this if the majority of the customers in your book of business prefer a non-English language.

Benefits to my Agency

- Extra Hands can help by allowing you to forward your phone for up to two hours each day to focus your staff on specific growth and retention activities
  - Prospecting
  - Customer cross-sell and retention efforts
  - Staff education and meetings
- Concierge service and reporting
  - A dedicated Concierge service is available for agents and staff to ask questions or address concerns.
  - Agents have access to comprehensive reports of work performed on behalf of agencies and are provided instant email notification of sales, quotes and follow-up requests.
- Proven results (July 2016 YTD)
  - Need extra capacity in your agency? Extra Hands provided over 33,000 hours of capacity on behalf of agencies enrolled in the Business Hours Call-Forwarding program.

Best Practices

- Don't forget about follow-ups!
  - Although Extra Hands attempts to service every customer need during an agent's forwarding time slot, there are some items that will still require the agent's attention. Please expect follow-up request emails for some of your forwarded phone calls.
  - Consider assigning a staff member in your office to manage the follow up emails.

Extra Hands Business Hours Call Forwarding

Agency Phone Carrier Requirements

- Automatic Number Identification (ANI) functionality through the agent's phone carrier is required for Extra Hands agency branding to occur.
- ANI pushes the agency forwarding phone number to the Extra Hands team so that agency branding information is automatically available to the call representative.
- Calls will still forward without ANI functionality, but Extra Hands will have to manually look up the agent with information from the calling customer.
- ANI functionality varies by agency phone carrier (complimentary, at an additional cost or no functionality at all).
- Phone carriers known to be ANI compatible:
    - Fonality
    - Lightspeed
    - Vonage
    - DYL
    - Nextiva
    - Spectrum
- Phone carriers known to NOT be ANI compatible:
    - 8x8
    - Comcast
    - AT&T
    - Time Warner Cable
    - Charter
    - Intermedia
    - Optimum
    - Birch Communications

- **NOTE:** The lists above detail phone carriers that Extra Hands has noted as being compatible or not compatible; **this list is not comprehensive.**
- Consider reaching out to your agency phone carrier prior to enrolling in Extra Hands Business Hours Call Forwarding to determine if they possess ANI functionality and if there is any additional cost.

Additional Resources

- Extra Hands Business Hours Call Forwarding FAQs
- Extra Hands Resource Page.
- Chat feature: https://agencygateway1.allstate.com/wps/myportal/id/149579 (Mon. – Fri., 9 a.m. – 7 p.m. ET)

Agency Sales Academy (ASA)

Contact Info | ASA@AgencySalesAcademy.com | 844.279.9929 | www.agencysalesacademy.com

Overview

Agency Sales Academy teaches insurance agency owners and staff how to grow their agency in any type of market. ASA will share their trade secrets through four main foundations: Hiring, Environment, Revenue and Operations. ASA will show you how to apply these foundations to produce business growth while also leading by example through community involvement and charitable contributions.

Agency Sales Academy was founded by Craig Wiggins, Jay Adkins, Keefe Duterte, and Kevin Mlynarek. These agents have a combined book of over $90 million in premium in agencies located in 4 regions and 6 states. ASA has worked with hundreds of Agency Owners and staff from all across the country in coaching programs and live events.

Craig, Jay, Keefe, and Kevin understand the challenges that you face every single day and want to help you overcome them. It's imperative that you are prepared to maneuver through the business environment and keep moving your agency forward. You must empower your team with the proper coaching and training to ensure you can grow your agency year after year and maximize potential.

Description	Agent Blueprint Price
ASA Self-Study Program *(2017 subscription)*	**$397**
ASA Self-Study Program with one Live Event *(2017 subscription)*	**$1,294**
ASA Associates Coaching Program *(2017 subscription)*	**$897**
ASA Associates Coaching Program with one Live Event *(2017 subscription)*	**$1,694**
ASA Live Event *(One 2017 Event)*	**$997**

What Can I Expect?

"Self-Study" Program

- Access to 10 ASA processes and supporting documents
- 2 Live Event Presentation video recordings
- 2 Coaching Webinar recordings
- Topics will include Hiring, Environment, Revenue, and Operations, all centered around increasing new business and retention for growth

"Associates" Coaching Program

- Access to 20 ASA processes and supporting documents
- 16 Live Event Presentation video recordings
- 16 Coaching Webinar recordings
- Topics will include Hiring, Environment, Revenue, and Operations, all centered around increasing new business and retention for growth

Agency Sales Academy (ASA)

Live Events

- 2 Day Events for Agency Owners and Staff led by ASA Co-Founders and their top LSPs
- Hands-On Coaching and Training
- Breakout Sessions for Staff
- Academy Curriculum Includes: Trusted Advisor, Staffing, Operations, Marketing, Value Based Selling, Bundling, ALR, IPS, Role-Playing, Overcoming Objections, and more
- ASA will have two live events in 2017. Once you register, we will follow up to confirm your choice.
  - February 9-10, 2017 in Atlanta, Georgia
  - September 7-8, 2017 in Las Vegas, Nevada
- Learn more about ASA live events and see complete details and agenda at http://agencysalesacademy.com/event/

Benefits to my Agency

- Develop the skills for you and your staff to achieve your business objectives.
- Learn how you and your staff can become a Trusted Advisor
- Learn to grow your business regardless of your competitive position
- Your staff will learn from other top performing LSPs from the ASA Co-Founders agencies
- Become a better coach and learn how to develop your team
- Attend a live event and learn from four top-producing Allstate Agency Owners and walk away with specific systems and processes that you can immediately implement in your agency

Additional Resources

- See what other Agency Owners and Staff have to say about ASA live events and coaching at http://agencysalesacademy.com/testimonials/
- Live Event details, agenda, hotel booking links and more information available on our website at http://agencysalesacademy.com/event/
- For optional upgrades and to purchase additional event tickets for your staff, please visit the ASA website at http://agencysalesacademy.com
- Questions? Email ASA@AgencySalesAcademy.com or call 844.279.9929

Risk Advisor Mastermind Group

Contact Info | info@RiskAdvisorInstitute.com | 704.612.0122

Overview

At the Risk Advisor Institute, we help insurance agents become trusted risk advisors. If you're tired of losing business on price, and you're ready to make the transition from quoter to trusted risk advisor, we have two resources that will help you.

First, we have a monthly program called the **Risk Advisor Mastermind Group**. This is the fuel that will inspire you and help you grow your agency. Every month you'll receive an audio CD that shares what the very best agents in the country are doing; from the systems they have in place, to the conversations they have with their teams and their customers, to specific tips for working with unique markets.

Second, Risk Advisor Institute has created the **Agency Transformation Package**. It has every piece you need to understand the comments top advisors make, the questions they ask, the stories they tell, and the diagrams they draw. The Agency Transformation Package is a FREE gift to you when you enroll in our Risk Advisor Mastermind group.

Description	Agent Blueprint Price
Risk Advisor Mastermind Group Membership *(2017 subscription)*	**$540**

What Can I Expect?

- **Your Risk Advisor Mastermind Group Membership includes:**
  - Monthly Hot Topic Call
    - Dial in to the Monthly Hot Topic Call to connect with Bill Whitley, Steve Wilmer, and other Mastermind Group members at 12p EST on the first Tuesday of every month to discuss new ideas and get your questions answered.
  - Risk Advisor Mastermind Group Forum
  - One-on-one Assessment call for your Agency
    - Agent or a team member will go through the 'Your World' Conversation over the phone. Best used when the agent and as much staff as possible can be on the call.
    - Assessment will include role playing to help improve the conversation and review of a rubric used for assessing through the conversation.
  - Complimentary Binder and CD Holder
    - Available by request, to be sent, for agents to keep all of their materials and monthly CDs - Email Beth@RiskAdvisorInstitute.com to request access.
  - Member only Discounts/Training
    - Members have the option to bring Steve Wilmer to their agency for half or full day training (Risk Advisor Boot Camp) for an additional cost- Available to Mastermind Group members only.
    - Members have the option to add ongoing phone coaching (Total Access) for their team- Available to Mastermind Group members only.
    - EA Funds cannot be used for additional materials or training. Any additional materials or training must be purchased directly through the Risk Advisor Institute.

- **Shipment Information:** Monthly CD will be shipped to the mailing address on file with Marketing Blueprint. If you would like to use a different mailing address please notify Beth Harwell at Beth@RiskAdvisorInstitute.com.

Benefits to my Agency

- Use the 'Your World' Conversation to Transition from a quoter to a Trusted Risk Advisor and turn your agency into an Automatic Marketing Machine. Agencies who implement these process increase the number of face-to-face appointments with customer, deepen the relationship with their customers, and receive more referrals and introductions.

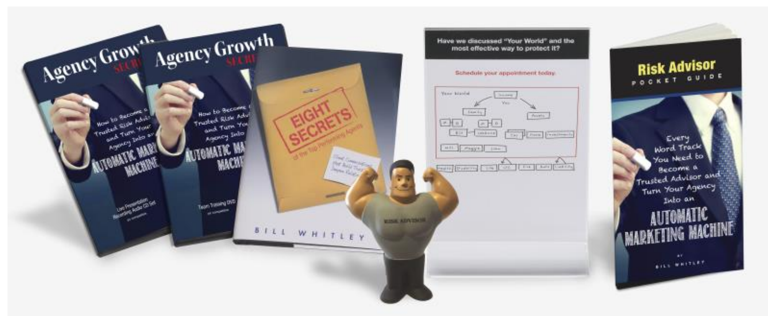
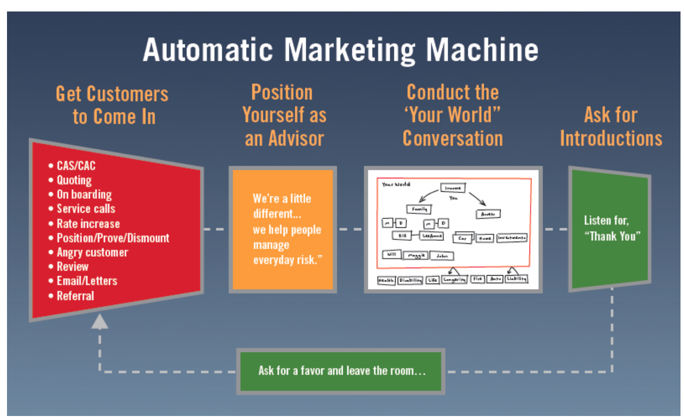
Best Practices

- A good best practice that can be implemented to help enhance the effectiveness of this program is to follow through the following steps included in your Quick Start Guide:
    - Read through the Risk Advisor Pocket Guide
    - Schedule and have a 'Your World' Conversation with a friend or customer you know well
    - Schedule the one-on-one Assessment call for you and your team
    - Schedule more 'Your World' Conversation
    - Use the Mastermind Group CDs to train your team and help keep them motivated and implementing as effectively as possible

Additional Resources

- Visit the Risk Advisor Institute website (www.riskadvisorinstitute.com) to learn more about the Mastermind Group and additional training and materials offered.

Risk Advisor Mastermind Group

Monthly Mastermind Group CD 	**Agency Transformation Package -** Free with Enrollment 
Digital Access to Materials: -Risk Advisor Mastermind Group -App (iPhone and Android) -Member Only Discussion Forum (Risk Advisor Mastermind Group on Facebook) and Member Only Website 	**Hot Topic Monthly Call-** First Tuesday of Every Month 12p EST Dial-in information available upon enrollment 
Total Access Program - One-on-one Training for your agency. Two training calls per month for individual assessments, 'Your World,' Appointment Setting, Referral Mastery, Overcoming Objections, and Selling More Financial Services Training  Bill Whitley, President Steve Wilmer, Director of Training	**Automatic Marketing Machine with 'Your World' Diagram** 

Greg Gray On Demand

Contact Info | greg@greggray.com | 770.498.9755

Overview

Greg Gray On Demand is a subscription based website that features hours of streaming training video content recorded live before Allstate audiences. Over the past 17 years, Greg has presented before more than 15,000 Agents, LSPs, Claims, and Regional employees in every one of Allstate's 14 Regions in 45 states and more than 150 cities. He is well immersed in Allstate's culture, language, and metrics making his real world content relevant to Allstate agents and staff. The site also includes downloadable mp3 audio content, dozens of techniques for handling premium increase conversations, improving agency Experience Scores (AES), innovative referral strategies and more.

Description	Agent Blueprint Price
Greg Gray On Demand *2017 Subscription (http://blueprint.greggray.com)*	**$149**

What Can I Expect?

- **24X7 access** to streaming video of Greg's most popular full-length video training seminars recorded LIVE before Allstate audiences.
- **Downloadable MP3 audio** of every one of the on-line seminars.
- An **"IDEA CENTRAL"** section of the site where subscribers will find some of the most innovative customer engagement strategies in use across the country.
- There will be a **single login** for your agency, so both you and your LSPs will have access to the information. **Multiple and simultaneous sign-on capability** make it possible for everyone in your agency to access GREG GRAY ON DEMAND at any time.
- **To activate your GREG GRAY ON DEMAND subscription**, you'll receive an email from Greg@greggray.com in the 1st week of your enrollment period complete with your initial login credentials and some fundamental directions on how to get started using the site.

Benefits to my Agency

- **24X7 training and development resource** for your agency from one of Allstate's most sought after speakers. Video and audio content includes everything from handle premium increase conversations to understanding and improving your Agency Experience Score.

Best Practices

- **Log in and get started right away!** You'll receive best practices for using the site on the site itself.

Additional Resources

- **Watch this video** excerpt from Greg's seminar, "WHAT WOULD A TRUSTED ADVISOR DO?" where he describes the difference between The TRUSTED advisor and The TRANSACTIONAL Advisor: https://greggray.wistia.com/medias/w4hfaai4oh