

## New Business Growth Framework Overview

The New Business Growth Engine is designed to give insurance producers a *proven, repeatable process* to generate consistent new business, starting with the easiest, fastest wins and building toward long-term, sustainable growth.

Each stage builds momentum for the next — converting open opportunities, reigniting dormant ones, activating new leads, and expanding your network — all while reinforcing structure, skill, and confidence.

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### Step 1: The Opportunity Converter

Objective: Convert existing open opportunities into the BOR process.

This is the *fastest path to new revenue*.

You'll:

- Identify current open deals you are working on.
- Re-engage them using the Premium Negotiation Strategy.
- Reframe the conversation around insight and value — not quoting or coverage reviews.

Outcome: Converting open deals into BOR opportunities.

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### Step 2: The Prospect Reactivator

Objective: Re-engage past prospects, lost accounts, and unclosed deals.

You'll:

- Build a simple “reactivation list” from old leads, lost quotes, and past clients.
- Use the reactivation script to spark curiosity and reopen the door.
- Focus on quick-touch outreach (calls, texts, or emails) that lead to short meetings.

This phase rebuilds momentum and confidence, creating conversations with people who already know your name.

Outcome: Leveraging the new strategy with past warm relationships to generate some quick wins.

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### **Step 3: The Revenue Stacker**

Objective: Expand your pipeline with brand-new prospects and stack revenue in the next 90 days.

You'll:

- Identify target prospects (by X-dates and revenue thresholds).
- Build your custom cold call script using the AI Script Builder.
- Run your prospecting block (two 40-minute sessions daily).
- Track objections, manage follow-ups, and strengthen your call rhythm.

This step is all about consistency and commitment. When executed daily, it builds your opportunities that renew within the next 90 days and gives you a solid path to quick revenue.

Outcome: A predictable stream of new opportunities each week – and the confidence to generate business on demand.

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### **Step 4: The Network Engager**

Objective: Leverage your relationships and build a long-term referral pipeline.

You'll:

- Engage centers of influence and referral partners.
- Schedule lunches, coffees, and strategic calls to share your BOR strategy.
- Position yourself as the go-to advisor who helps clients get the best deal in the market.

This phase shifts your growth engine from *push* to *pull* – where opportunities start coming to you.

Outcome: Sustainable long-term business growth and a strong reputation in your niche.