

## **Goal: Successfully execute outbound calls to invite agents to attend online or in-person workshops**

*Note: This list is constantly evolving*

### **TLO 1.0 Describe Builders Risk, Vacant Structures, Rental Dwellings and Premises Liability insurance as it relates to <COMPANY> and the Marketing call team**

- ELO 1.1.0 Summarize builders risk based on the conversation with an agent
  - ELO 1.1.1.0 Explain residential builders risk (RBR) and its sub-products
  - ELO 1.1.2.0 Explain commercial builders risk (CBR) its sub-products
  - ELO 1.1.3.0 Explain the Vacant Structure product
  - ELO 1.1.4.0 Explain the Rental Dwellings product
  - ELO 1.1.5.0 Explain the Premises Liability product
- ELO 1.2.0 Recite <COMPANY>'s value limits for each applicable product and structure type

### **TLO 2.0 Discuss <COMPANY>'s distribution model while executing calls**

- ELO 2.1.0 Describe <COMPANY>'s role in the insurance industry
- ELO 2.2.0 Describe <COMPANY>'s relationship with <COMPANY>
- ELO 2.3.0 Identify the various roles within an insurance agency
- ELO 2.4.0 Differentiate relationships between <COMPANY> and an insurance agent
  - ELO 2.4.1.0 Define Market Access Providers (MAPs)
  - ELO 2.4.2.0 Define <COMPANY> Direct Appointments
  - ELO 2.4.3.0 Define independent agents
  - ELO 2.4.4.0 Identify agent relationships in Salesforce
- ELO 2.5.0 Distinguish different record types in Salesforce using page layout and design

### **TLO 3.0 Compel an agent to attend <COMPANY>'s online and in-person events while executing calls**

- ELO 3.1.1.0 Describe <COMPANY>'s event promotion philosophy
- ELO 3.1.2.0 Define why workshops are relevant to the agent
- ELO 3.1.3.0 Advise who should attend
- ELO 3.1.4.0 Describe the location (if online, explain the virtual format)
- ELO 3.1.5.0 Recall the information covered during events

### **TLO 4.0 Make use of Salesforce to support call execution**

- ELO 4.1.0 Navigate Salesforce to access assigned calls
- ELO 4.2.0 Choose the correct outbound skill in InContact
- ELO 4.3.0 Utilize Salesforce's search feature to find additional and or duplicate records
  - ELO 4.3.1.0 Identify which record to contact if multiple options are available
  - ELO 4.3.2.0 Modify duplicate lead and producer records to merge overnight
- ELO 4.4.0 Document call notes accurately
- ELO 4.5.0 Select the appropriate call disposition reasons at the end of each call
- ELO 4.6.0 Register an agent to attend an event

### **TLO 5.0 Define common insurance industry terms and acronyms**

### **TLO 6.0 Compare and contrast the differences between one shots, reporting forms, and deposit premium**

### **TLO 7.0 Call Schedule**

- ELO 7.1.0 Locate weekly assigned calls and daily and weekly call goals
- ELO 7.2.0 Compare the call schedule vs. the funnel in Salesforce
- ELO 7.3.0 Recall priorities for each week

### **TLO 8.0 Facts and figures about <COMPANY>**

- ELO 8.1.0 Recall the year <COMPANY> was founded
- ELO 8.2.0 Restate <COMPANY>'s current year premium goal
- ELO 8.3.0 Review the daily premium email

## Learning Timeline / Accomplishments

- **Week 1**

- Confirm access to all systems, resolving any issues as needed
- Have a basic understanding of <COMPANY> and Builders Risk insurance
- Observe Event Promotion calls
- Execute Event Promotion calls with observation
- **Milestone:** Execute Event Promotion calls without observation
- **Knowledge Check:** Review records and calls in Salesforce / InContact w/ Bill or call team member who trained them. (Future state will add a quiz)

- **Weeks 2-8**

*Note: This is personalized to each learner's pace.*

- Review records and calls in Salesforce / InContact
- Increase understanding of <COMPANY> and Builders Risk
- Observe Event Follow Up calls (or Nurture calls as a backup)
- Observe Service / Underwriting (if possible)
- Go through the process of signing up to attend an event, including attending the event itself (at least one workshop and one webinar)
- **Knowledge Check:** Execute Event Follow Up calls with observation. Additionally, a discussion with Bill who will evaluate readiness based on live listening and recorded call evaluation (Future state will add a quiz)
- **Milestone:** Execute Event Follow Up calls without observation
- Review evaluated calls in InContact

- **Weeks 8+**

- Execute Event Follow up calls without observation
- Continue to expand knowledge of Builders Risk insurance / P&C industry / <COMPANY>
- Review evaluated calls in InContact
- Observe New Producer Nurture calls (after Bill determines the learner has enough knowledge to do so)
- **Knowledge Check:** Handle New Producer Nurture Calls with observation. Additionally, a discussion with Bill who will evaluate readiness based on live listening and recorded call evaluation
- **Milestone:** Handle New Producer Nurture Calls without observation.
- **Milestone:** Handle Info Box emails

## Role Progression

- **Marketing Associate to Marketing Representative**

- Successfully handle assigned call volume
- Be a good fit for the role (based on the Marketing Rep job description)
- Desire to obtain more knowledge about Builders Risk
  - “to obtain the aptitude”

- **Marketing Representative to Marketing Specialist**

- Mastery of all assigned call types and relevant metrics
  - Can be measured with a discussion (interview?) and knowledge check
- Demonstrated ability to:
  - Apply sales-minded marketing techniques
  - Successfully complete complex or time-sensitive agent or Sales Support requests
  - Train new hires and existing call team members
  - Contribute to team and department level projects
- Successful “interview” (discussion / evaluation) with Bill
- Pass an exam / quiz / test

- **Marketing Specialist to Distributor Relationship Specialist**
  - Mastery of all assigned call types and relevant metrics
  - Mastery of sales-minded marketing tactics
  - Proven ability to develop relationships with producers and distributors outside of typical call execution
  - Subject matter expert regarding Builders Risk
  - Increased knowledge of the P&C industry
  - Clear understanding of how an agency functions
  - Successful “interview” (discussion / evaluation) with Bill
  - Pass an exam / quiz / test