

## MINUTES OF MEETING WITH MADI

### **08-09-24 BA Weekly Meeting**

In attendance: Renee, Andy, Russ

### **08-02-24 BA Weekly Meeting**

- In attendance: Renee, Madi, Andy, Russ
- We discussed the reviews on our website.
  - Andy thanked Madi for being focused on setting up the email, especially being responsive to the reviews. She also asked Madi how to remove those negative reviews from the website.
  - Madi suggests if we can get more stellar reviews, those negative comments will disappear or will be covered.
- Renee brought up the Excess for Target's Plumbing that she sold for Andy.
  - Renee asked Andy to send the signed docs thru E-sign to notify the client.
- Andy raised her concern in regards to her account which is RG Construction. Her client worked from a previous company and now, he plans to restart his business however, the license is still deactivated. The client provided him with updated info, 1M Gross Receipts with 100k subs and planning to hire employees in the future.
  - Renee told Andy that she will call the client and explain everything.
- Renee asked BA if we have an available carrier that covers uninsured subs.

- Russ suggested CS however, they require small percentages for the uninsured subs to cover them. Also he suggests NEXT that we can include subs in the policy but it depends on the class codes.

### **7-26-24 BA Weekly Meeting**

- In attendance: Renee, Andy, Alex, Russ
- We discussed our potential accounts.
  - Alex informed Renee that he has a 2 potential leads and waiting for their decision and he is hoping that they move forward with us before the end of the month.
  - Russ told Renee that he has 1 potential client today, waiting for the documents to be signed before the end of their work.
- Andy raised her concern in regards to her potential account AVA Electric.
  - Renee asked Andy to send the WC, Auto and GL as she would like to review it first
  - Andy told Renee that she will call her client about Loss Runs for approval.
- Russ and Renee exchange their concerns regarding the one account that they are working on. And waiting for the signed declaration page from the client.
- Russ suggested sending the new leads in the morning as they are doing a lot of stuff in the afternoon.
  - Renee agreed that it should be done by 8 in the morning.
- Renee and BA decided to set our Weekly Meeting standard time at 1:30 PM and put on their calendar.

### **7-19-24 BA Weekly Meeting**

- In attendance: Renee, Andy, Alex, Russ
- We discussed our potential accounts.
  - Alex informed Renee that he already sent her 3 potential leads to be called.
  - Russ told Renee that he has 1 potential client today, waiting for the documents to be signed before the end of their work.
- Andy raised her concern in regards to her potential account AVA Electric.
  - Renee asked Andy to send the WC, Auto and GL as she would like to review it first
  - Andy told Renee that she will call her client about Loss Runs for approval.
- Russ brought up his conversation with Pascal in regards to exclusion for defense outside limits, fire suppression and fall from height removed as his client's request.
  - Renee asked Russ to keep her posted if there are additional questions from ~~his clients~~ Josh Begin Construction.

- Russ suggested sending the new leads in the morning as they are doing a lot of stuff in the afternoon.
  - Renee agreed that it should be done by 8 in the morning.
- Renee and BA decided to set our Weekly Meeting ~~Standard~~ standard Time at 1:30 PM and put on their calendar.

### **7-12-24 Broker and BA meeting**

- In attendance: Madi, Renee, Andy, Alex, Russ
- The BA with the lowest amount of the sales for the day will send their assigned broker 3 potentials that they want help with before 9 AM
  - If there is a tie for the lowest amount of sales, then the 2 lowest sales BA's will both send their assigned Broker 2 potential leads before 9 AM
  - This also means at the beginning of the month when both BA's have no sales, they are tied, so they will both send their broker 2 leads for the day.
- We discussed some bad reviews that we have
  - Madison suggested that we create a 1-2 sentence spiel on what to say to customers when they ask why our reviews are bad
  - We also discussed transferring to Pascal to talk to clients business owner to business owner.
  - Andy brought up some concerns that clients have when reviewing our reviews.
  - We also spoke about asking clients to review us.
  - Madison discussed her efforts with the marketing team and how we are creating a new "review us" template.
- Russ brought up what to do when a client asks for a spanish speaker
  - Madison advised that if a client physically asks to speak to a spanish speaker or that they're having trouble understanding what is being said then it is okay to transfer directly to Judy
  - If a client just has a spanish name or accent and doesn't ask for a spanish speaker, they are to be transferred to Renee
    - If Renee comes across a client that asks for a spanish speaker, she will transfer this call to Judy.
- Broker and BA team decided to set a standard meeting time of 1:30 every Friday
- Madison will be joining the Broker BA meeting on the first Friday of every month