

SALES MEETING AGENDA

MONDAY, JUNE 8, 2020

I. Sales Results

II. 2020 Target Account

1. **Definition:** One suspect that you have no relationship with, but you have identified the business as a dream win
2. **Next Step:** Share your target account at the February 10 sales meeting
3. **Goal:** Generate and build ideas as a team during the sales meetings to attract, capture, nurture, and convert each suspect to a client

Bergquist – Give em a Break Safety (6/8) OVD current agent. In ABC Fund. Was with EMC at one time. Investigate losses vs premium.

Mark – Fox Motors – (2/10) recognized name in W. MI. Captive opportunity. Beth Horning – Continental Western. (3/9) Received possible indication they were going to market. Mark to contact & keep in touch more frequently. Mail hard copy of Affinity report. (6/8) Phone calls and email unanswered. Did mail Affinity report. Mark to continue to try and connect.

Derek – Ranger Die – (2/10) high visibility on highway. Dan & Dave met last summer re P&C. (3/9) Waiting on Dan for P&C follow-up) (6/8) Continue to try to connect.

Eric – S2 Yachts – (2/10) boat interest – manufacturer. (3/9) VP of Finance is Ed Walsh. Ed was previously controller at GFS. Introduction through Tim McNally?

Matt – Kent Companies – (2/10) New CFO Ben Herrema. Interest in Captives. In ABC fund. (3/9) Operate in multiple states and have multiple WC policies. Ben's FIL is Vander Laan. Sold residential arm to Wierenga, Dan may have connection for Matt. (6/8) LI and email contact with no response. Trying to reach Ben via FIL. Matt and Dan VB to work together to contact. Next steps: continue to call and send letter.

Dave – Atonne Group – (2/10) Chicago Drive. USI agent retiring. CFO Kevin Van Overloop reached out to Affinity. (3/9) Dave to send Affinity report to Kevin and introduce himself. (6/8) Next steps: contact Kevin Van Overloop and Joe Colaluca.

Gen – Calvin University (3/9) – Previously with Buiten. Aon took over benefits and had \$1Mil rnwl increase. Gallagher has P&C. New CFO is Mr. English. Reach out and schedule introductory meeting. (6/8) Still on lockdown.

Vander Baan – (6/8) OFI in Conneticut. Referral.

III. Breaking Down the Proposal: Spectrum of Benefits

IV. Lessons Learned from COVID-19 Quarantine

1. Did we become better consultants?
2. How do we move forward with what we have learned and positively impact clients and prospects?
 - After hour service b/c of remote availability
 - Email blasts contacting clients with updates
 - Less amount of travel –
 - is this a new reality?
 - Is it realistic to not have face-to-face at the expense of a competitor?
 - Talk more often to clients face-to-face remotely via Zoom. This is more personal than a phone call or email
 - Do not cookie cutter communication for all clients
 - Ease of doing business – DocuSign