

**BIG I**

---

**KENTUCKY**

A black and white photograph of a man, Brandon Smith, standing on a stage. He is wearing a denim jacket over a dark hoodie and dark jeans. He is holding a microphone in his right hand and gesturing with his left hand. The background is dark with several bright stage lights hanging from the ceiling, creating a dramatic effect. The word "Different" is written in a large, teal, cursive font across the middle of the image. Below it, the words "WITH BRANDON SMITH" are written in a smaller, white, sans-serif font.

# *Different*

WITH BRANDON SMITH

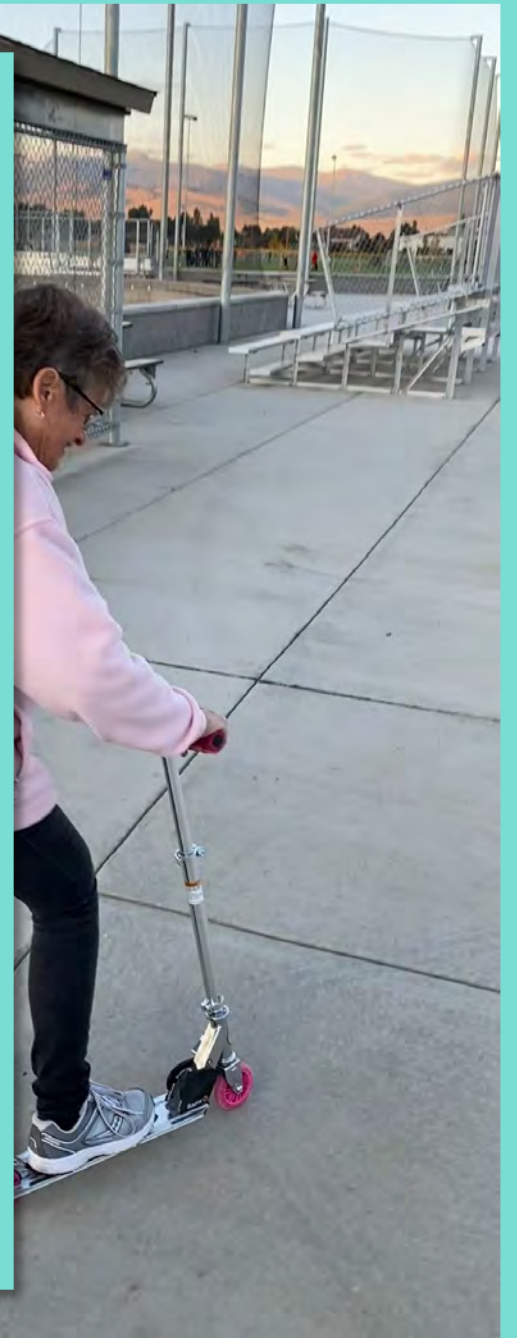
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agency

CULTURE/COURSE

**pd** Producer  
Development  
Program













# *Different*

*A different approach to business relationships.*







# WOW MOMENTS

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“Do what you do so well that they will want to see it again and bring their friends!”

- WALT DISNEY



# WOW MOMENTS

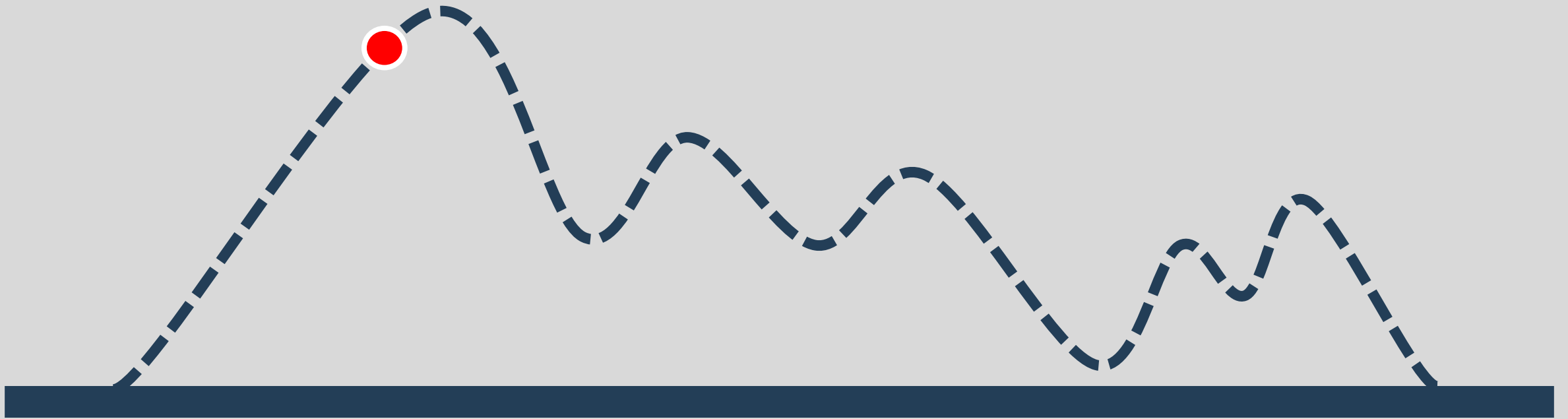
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“Do what you do so well that they will want to see it again and bring their friends!”

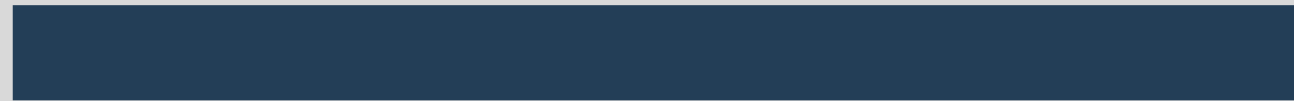
- WALT DISNEY



You can't judge success on a plotted point.  
**You judge success on a trajectory line.**



The difference between a *contact* and a *contract* is the letter R.





The difference between a *contact* and a *contract* is the letter R.

**RELATIONSHIP**

A thick dark blue horizontal bar is positioned below the word 'RELATIONSHIP'. Below this bar, on the right side, is a thin black horizontal line.



Uber

**NETFLIX**





**Technology** by itself is not the disruptor.  
Not being **relationship-focused** is the  
biggest threat to your business.





# FIELD OF DREAMS



# Team Sponsorship



---

**\$500.00**

- *Sponsor name printed on team hats*
- *Business logo printed in Opening Day Media Guide*



# Draft Letter



- *Important*
- *Anticipation*
- *Valued*
- *Different*

# Glidewell.

Uriah Johnson  
2511 Latigo Dr  
Missoula, MT 59808

## CONGRATULATIONS!

Uriah, you have been drafted to play baseball this season for Glidewell. I am so excited to have you on the team. At tryouts two weeks ago, I was really impressed with your hustle and your arm, that's why I selected you to our team! I'm super excited to coach you this season and look forward to meeting you at our first practice, Monday April 2<sup>nd</sup> at 5:30 pm – Westside Little League, field #3.

Can you do me a favor? After our first practice we are going to have a brief meeting for all the parents...Can you be sure to let your parents know about the meeting? I'd love to have at least one of them there Monday at 6:45.

If you have any questions give me a call or shoot me text at any time. See you on the 2<sup>nd</sup>.

Play ball,



Brandon Smith  
EVP of Development & Strategy  
406-531-3805  
[brandon@glidewell.pro](mailto:brandon@glidewell.pro)

## Little League



Brandon Smith

To Brandon Smith

↩ Reply

↩↩ Reply All

→ Forward

⋮

Good afternoon!

Hopefully by now your son has received the first draft letter of his baseball career. My name is Brandon Smith, and I am super pumped for the opportunity to coach your son this coming season.

If your son hasn't shared with you, our first practice will be Monday, April 2<sup>nd</sup> at 5:30 pm on field #3. Also, we will be concluding practice with a brief 15-minute parents meeting at 6:45 pm...we will be discussing team news, updates, and expectations for the season.

In the meantime, should you have any questions, concerns, or desire to help our ballclub in anyway, I can be reached via email or on my cell, 406-531-3805.

See you on the 2<sup>nd</sup>.

**Brandon Smith** | EVP of Development & Strategy

ROUGH NOTES AGENCY OF THE MONTH

1750 South Avenue | Missoula, MT 59801

406.728.0793 | [www.glidewell.pro](http://www.glidewell.pro)

# Glidewell.

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# Branded Hats

---



**\$125.16**

- \$8.94 per hat
- 11 Players + 3 Coaches



# Practice



---

- *Highlight of their week*
- *Gift cards*
- *Relational*
- *Build self esteem*
- *Valued*

Brandon Smith

Carter –

Great practice last night! I am  
so impressed with your hustle.  
Thank you for being a leader.  
Keep it up!



Brandon

**Glidewell.**

Brandon Smith

Joe & Stephanie,

Thank you for allowing me to invest in your son, Will. It has been an honor getting to know you and your family this baseball season. See you Thursday night.

Brandon

**Glidewell.**

# Social Media




---

- *Highlight the kids*
- *Tag parents*
- *Make posts shareable*
- *Create a fan base*





**brandon5mith** My favorite team will always be wherever  
[@boston5mith](#) plays!  [#15](#) [#prouddad](#)



**brandon5mith** Love these guys. 🏆 #taco #blair #iceman #liam #sweetheart  
#peabody #uj #brooks #lando #samiam #bubbles #zeke #princess  
**glidewell.pro** Go Blue!!!






**glidewell.pro** Despite the wind, snow, hail, and rain, Carter Blair struck out seven and Uriah Johnson had a clutch RBI to tie the game in the 4<sup>th</sup>. In the end, Glidewell defeated Frenchtown 7-5, on Friday evening in Missoula, MT. The boys take the field again tonight in 6:00. 🏴⚾️ [#littleleague](#) [#missoula](#)





**glidewell.pro** @creilly27 had four strikeouts in two innings of relief. @boston5mith had a #sctopten barehanded grab for a timely out. In the end Glidewell defeated a solid Butte team 14-1 . 🏆 #littleleague #baseball #missoula



**glidewell.pro** The streak continues! Glidewell has won 7 in a row! Glidewell won 13-0, thanks to a phenomenal pitching performance by [@taco22](#), and Brooks Airhart going 4-4 with 6 RBI's!  [#littleleague](#) [#baseball](#)





**glidewell.pro** They do it again! Glidewell wins on the last play of the game. [@boston5mith](#) stole home for the game winning run!



[#littleleague](#) [#baseball](#) [#walkoff](#)





Brooks Airhart was in the zone, tallying four hits and leading Glidewell to a 14-1 win over Mt Jumbo. Brooks singled in the first, homered in the second, tripled in the fourth, and singled again in the fifth.

Glidewell fired up the offense in the first inning. Carter Henry drove in one when with a double to right field.

Glidewell notched four runs in the second inning. The offensive onslaught by Glidewell was led by Carter and Brooks, all driving in runs in the inning.

Blake Fackler led Glidewell to victory on the hill. The bulldog lasted three innings, allowing zero hits and zero runs while striking out seven and walking zero. Carter and Riley Morton entered the game out of the bullpen and helped to close out the game in relief.

Jasper C took the loss for Jumbo. Jasper surrendered nine runs on 12 hits over three innings, striking out five.

Glidewell tallied one home run on the day. Brooks had a dinger in the second inning.

Glidewell saw the ball well, racking up 17 hits in the game. Brooks, Boston Smith, Blake, and Carter all collected multiple hits for Glidewell. Boston and Brooks each managed four hits to lead Glidewell. Glidewell was sure-handed and didn't commit a single error. Glidewell stole 13 bases during the game as four players stole more than one. Brooks led the way with four.



Karen Zarbolas

June 27 · 🧑🏻‍🤝‍🧑🏻



This evening Vincent's baseball team was surprised by their coach with awards. Vincent was MVP. Brandon Smith you are an amazing coach and we feel lucky to have had Vincent on your team. Thank you for everything you have done for the team, and we look forward to seeing you next season.



You and 24 others

9 Comments



Love



Comment

View 3 more comments



Sharon Alsbury Cole Nice!!

Like · Reply · 20w



1



Paula Wells Hinkson Congratulations Vincent!

Like · Reply · 20w



1



Vini Stafford Very cool.

Like · Reply · 20w



Brandon Smith Such an honor coaching this kid! Super proud of you V, keep up the great work!

Like · Reply · 20w



1



Doug Hinkson Wow, Congratulations Vincent !

Like · Reply · 19w



1



Fred Wells Way to go Vincent!

Like · Reply · 19w



1



Write a comment...



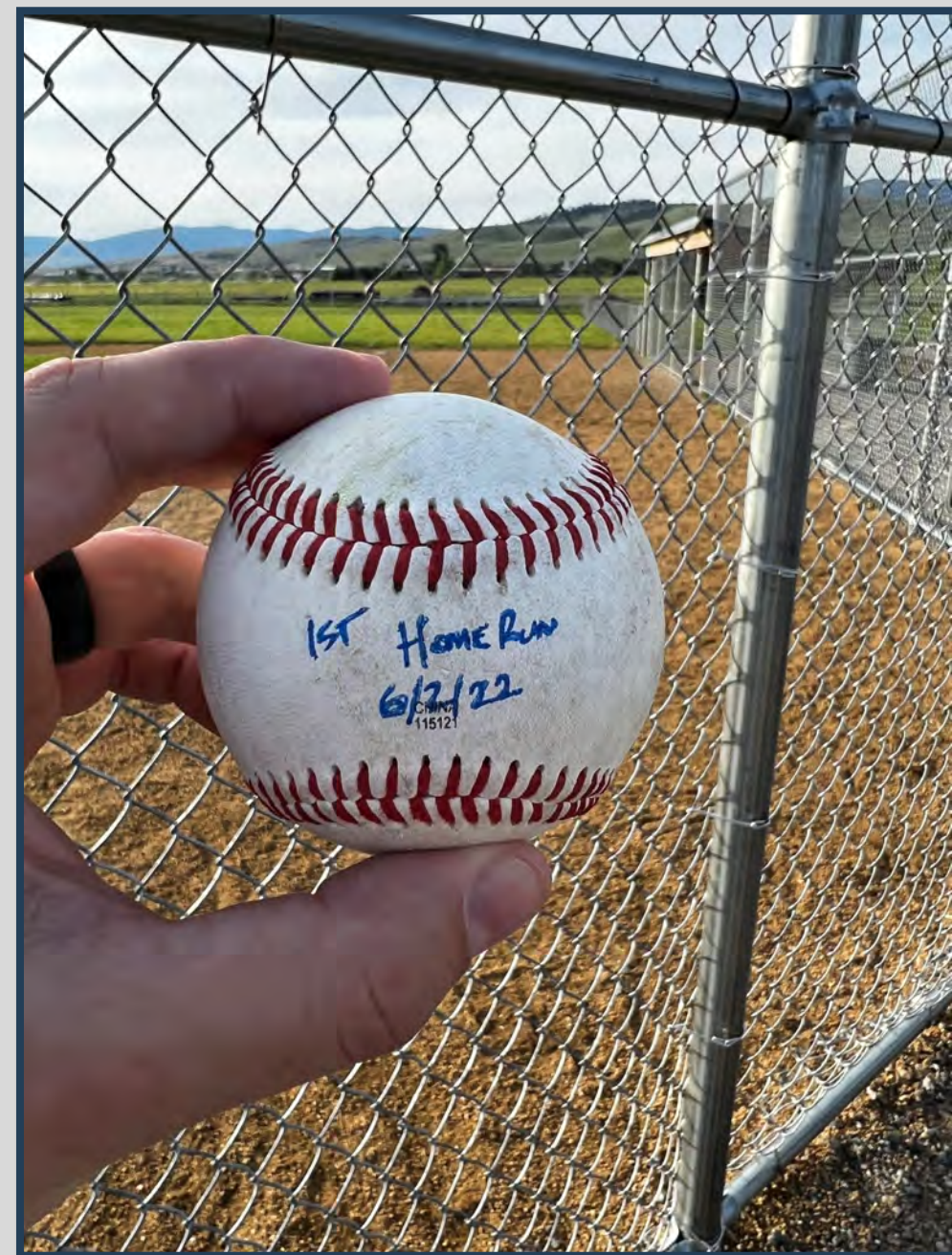
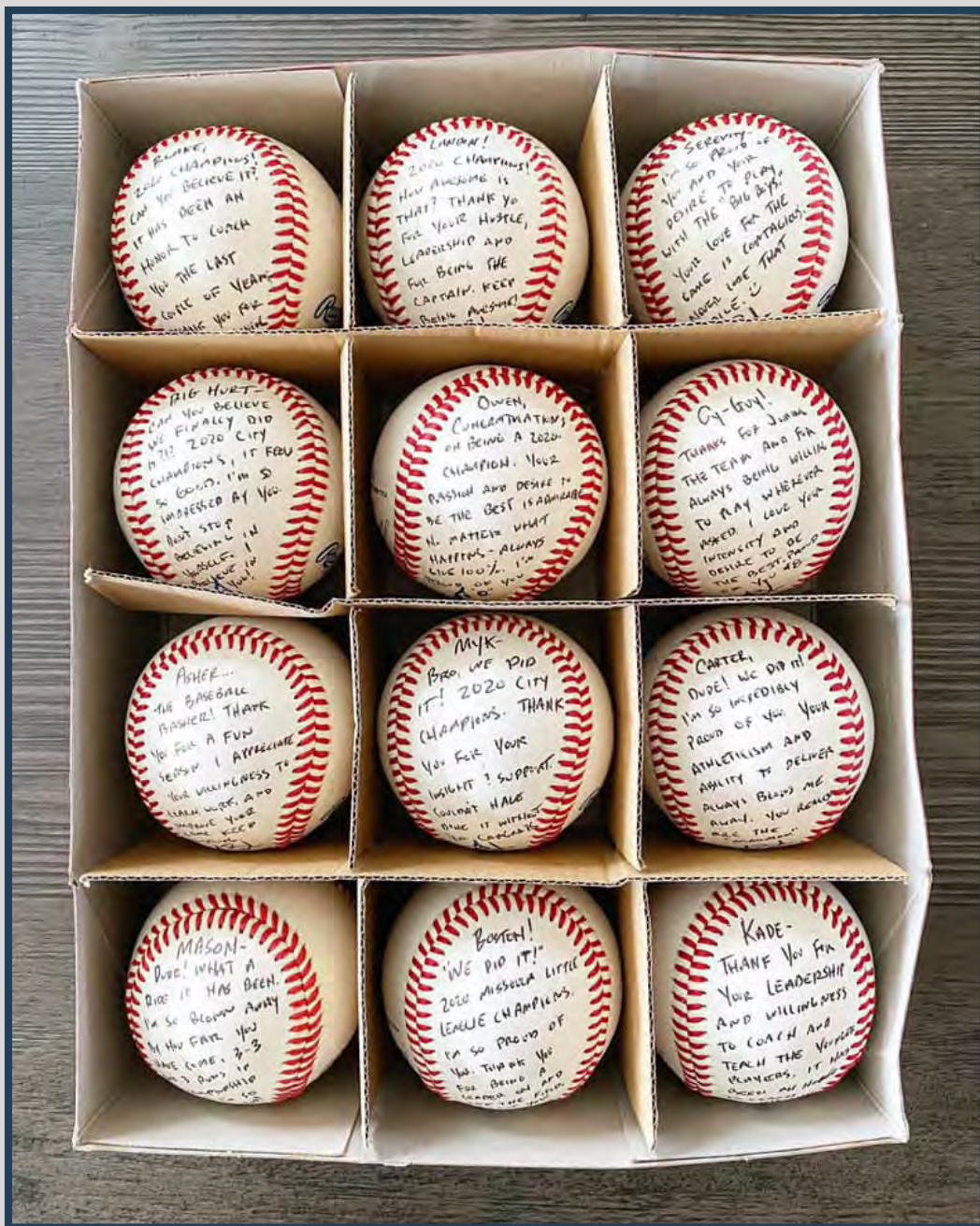


# Award Ceremony

- Barry Bonds Award
- Shohei Ohtani Award
- Cy Young Award
- Golden Glove Award
- Ricky Henderson Award
- Roberto Clemente Award
- Silver Slugger Award
- Reliever of the Year Award
- Offensive Player of the Year Award
- Defensive Player of the Year Award
- Most Valuable Player Award



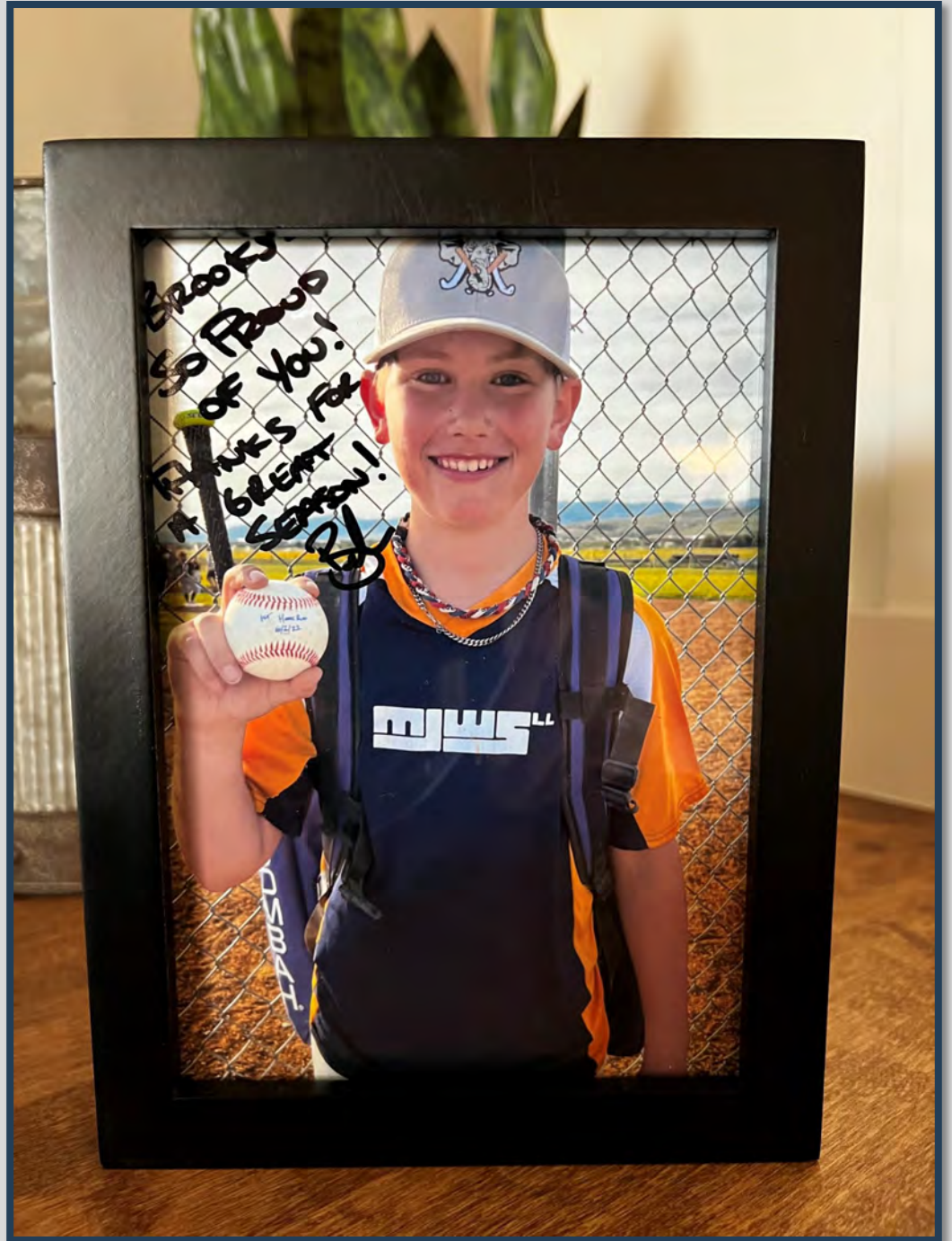
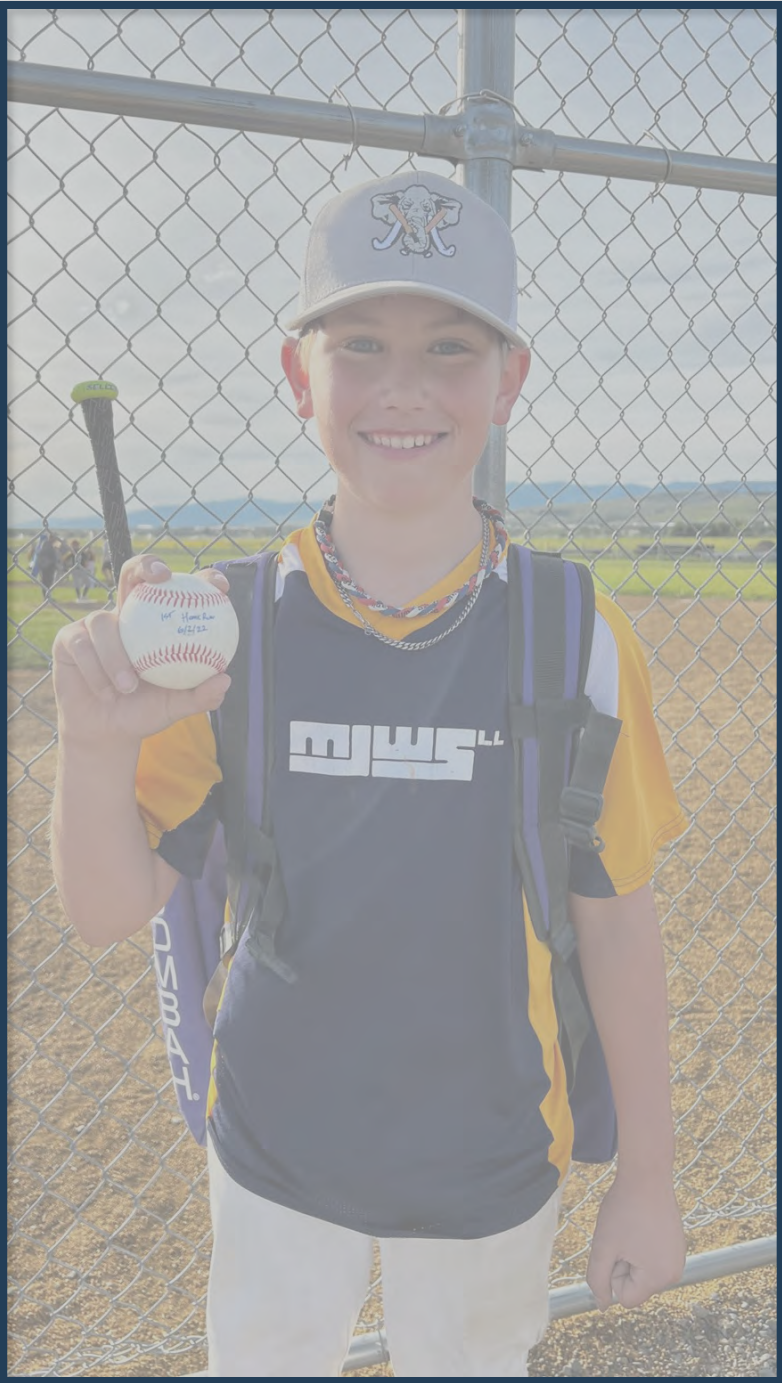
















**Kristin Eckholm** · with Brandon Smith  
16h · 🧑🏻‍🦱

Proud mom post - Brooks won MVP for the season!

His stats from his Little League season: .697 Batting average, 23 hits, 26 runs, 26 RBI, 29 stolen bases, 5 strikeouts, 3 in the park home runs, 1 over the fence home run!



 Katy Lytle, Tiffany Deaton and 109 others

28 Comments

 Like

 Comment

View 27 previous comments

Most relevant ▾

**Brandon Smith**

Such a stud, so proud of him. Thank you for the opportunity to coach and invest in Brooks. He's a great kid, has a huge heart and one heck of a baseball player. Can't wait to see what's next.

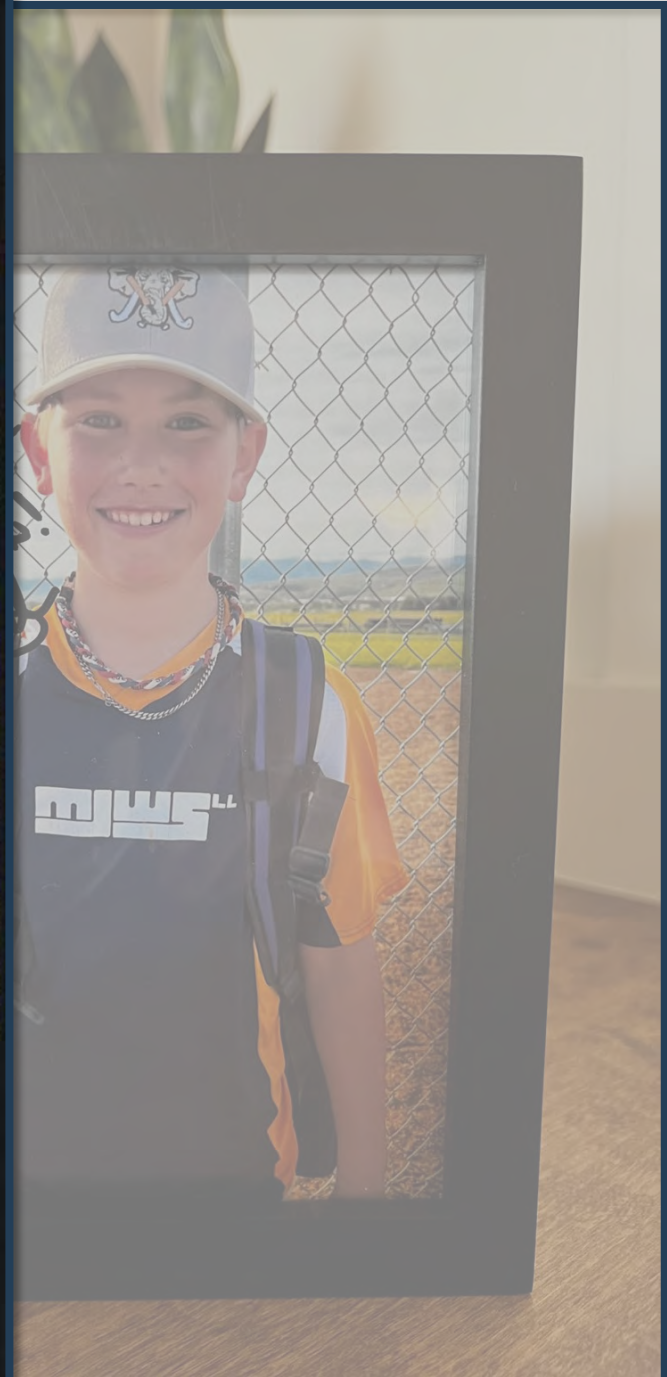
Like

Reply

14m

Write a comment...





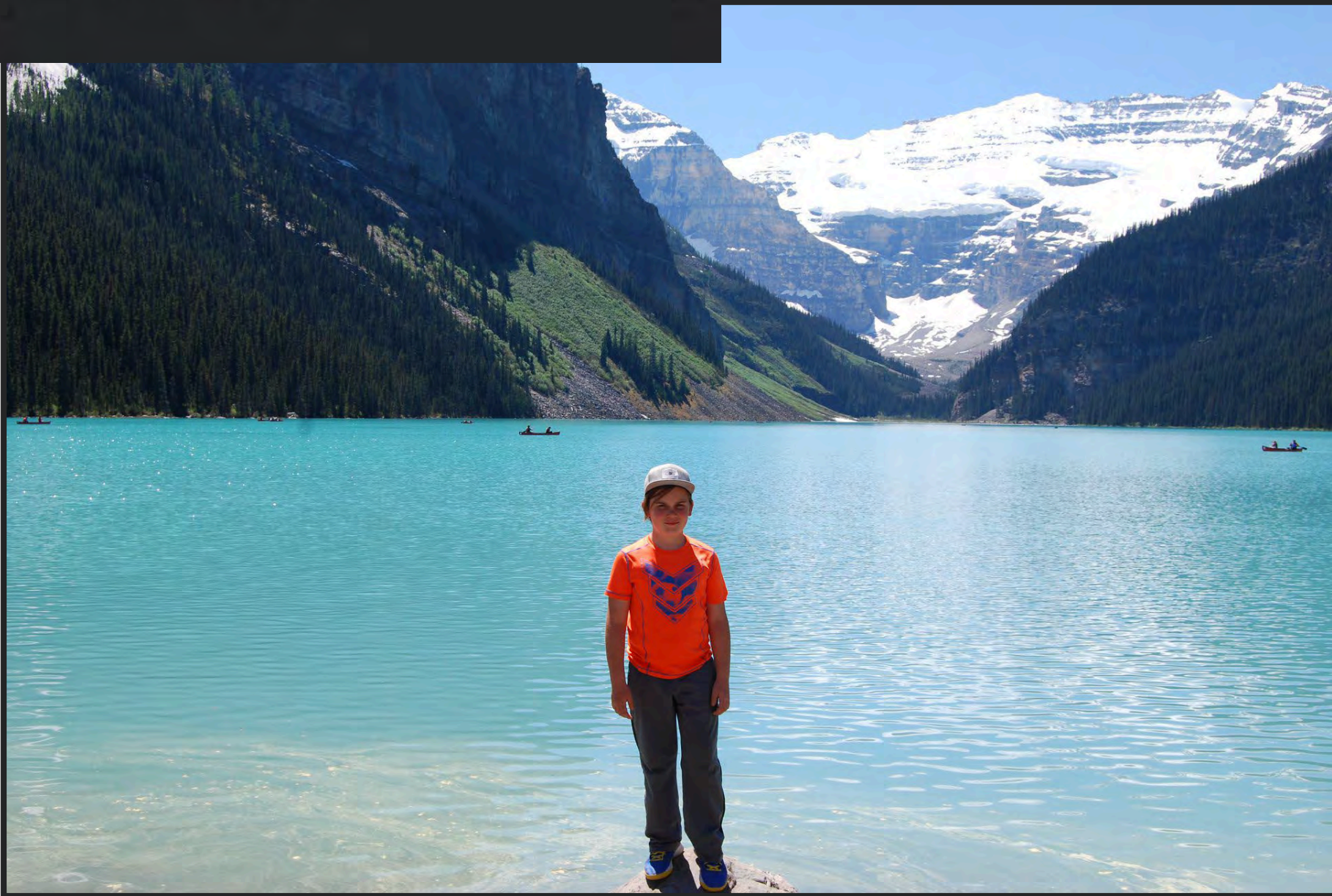




Karen Zarbolias is with Jon Zarbolias at Lake Louise.



Lake Louise in Banff





# Box Score

INVESTMENT	UNIT PRICE	TOTAL
Team Sponsorship	\$500.00	\$500.00
Team Hats	\$8.49	\$118.86
Dairy Queen Gift Cards	\$5.00	\$55.00
Trophies	\$9.72	\$106.92
Miscellaneous	\$234.87	\$234.87
TOTAL INVESTMENT		\$1,015.65

# Batting Order

#	PLAYER	POSITION	REVENUE
5	Princess	Right Field	\$313
2	Blair	Pitcher	\$8,846
22	Taco	First	\$207
52	UJ	Shortstop	\$418
99	Captain	Catcher	-
15	Sweetheart	Second	NA
27	Iceman	Center Field	\$1,046
9	Peabody	Left Field	-
7	Bubbles	Third	\$581
4	Lando		-
13	Sunshine		\$452
TOTAL REVENUE			\$11,863.00

**\$11,863.00**









**IF YOU BUILD IT,  
THEY WILL COME.**



# Save 10 hours this week!

Why do people brag about working 50, 60 or even 75 hours per week, like it's some badge of honor?

What a poor use of time...and life. Do you want your life to be more productive and efficient so you can spend more time with your family, traveling and just having fun.

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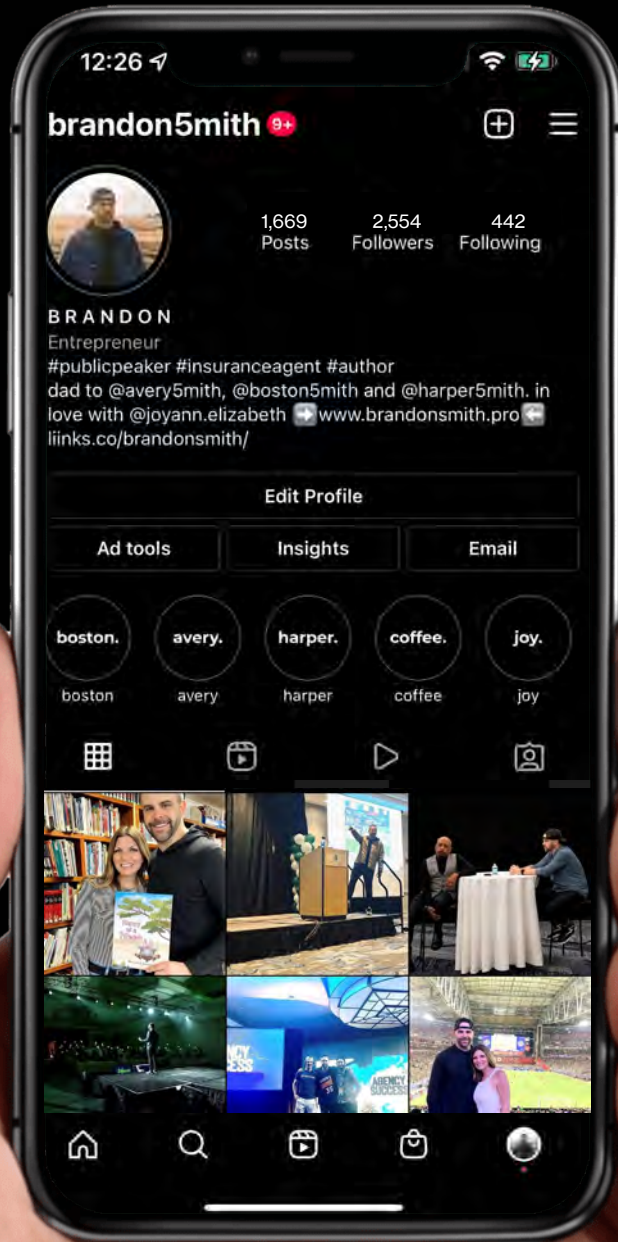
## **13 Innovative Time Saving Strategies** for Insurance Agents



**BRANDON SMITH**



# FIND ME ON INSTAGRAM



**@brandon5mith**

Will you do me a favor? Take a picture during this session and post it to your Instagram feed or Instagram story and tag me.

▶ 6.8M



brandon5mith  
plantdaddy55\_ · Ed Bassmaster



60.1K



1,359

...



@brandon5mith

▶ 6.8M



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plantdaddy55\_ · Ed Bassmaster



60.1K



1,359

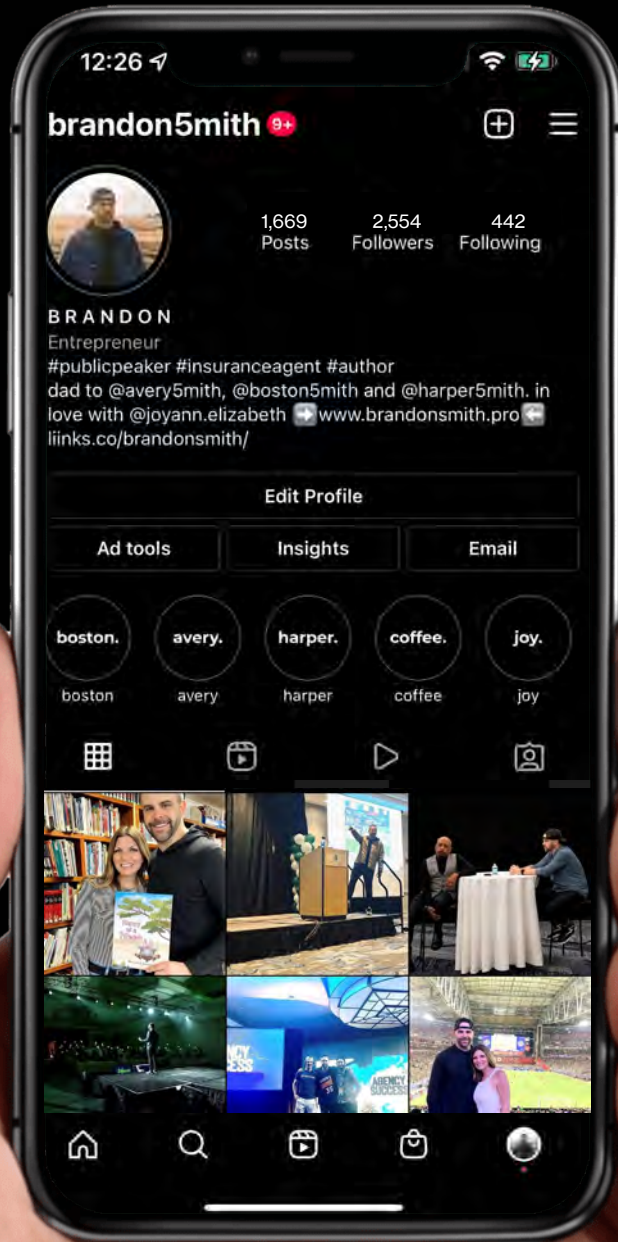
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@brandon5mith



# FIND ME ON INSTAGRAM



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- 1 +

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**Brandon Smith** ▶ Missoula Online  
**Yardsale**



1 hr · Missoula, MT ·

Who want's Howard's Pizza delivered for dinner Friday night? Here is how it works:

- 1) Like our page (if not already) at **Glidewell**
- 2) Like Howard's Pizza's page (if not already) at **Howard's Pizza Missoula**
- 3) Then comment below with "Howard"

We will verify LIKE's and choose one lucky winner to have their choice of two large pizza's delivered Friday night, FREE with tip included. Winner will be chosen this Thursday at 5:00 pm. Ready, set, go!

\*Admin Approved\*

— at **Howard's Pizza Missoula**.






View more comments...

 Shelay Keith  
Howard  
5h Like Reply

 Carol Moe  
Howard  
5h Like Reply




 Alison Lokey Easter  
Howard  
5h Like Reply

 Peter Zavarelli  
"Howard"  
4h Like Reply

 Deneice Hadlock Knight  
"Howard"  
4h Like Reply

 Melissa Stephenson  
Howard  
4h Like Reply

 Lanekendra Coyle  
Howard  
4h Like Reply

 Write a comment...  

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"Howard"  
3h Like Reply

 Markie Jo Furr  
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2h Like Reply


 Pedge Crawford  
Howard ❤️🍕😄  
2h Like Reply




 Bri Kamrath  
Howard  
2h Like Reply

 Michele Lafranchi Williamson  
Howard 🍕  
1h Like Reply

 Kristel Jade Kortum  
"Howard"  
50m Like Reply


 Roxanne Reinicke Williams  
Howard  
40m Like Reply

 Elisha Brewer


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 Bri Kamrath  
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2h Like Reply

 Michele Lafranchi Williamson  
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1h Like Reply



 Kristel Jade Kortum  
"Howard"  
50m Like Reply

 Roxanne Reinicke Williams  
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40m Like Reply

 Elisha Brewer

 Write a comment...  



 Melinda Magstadt  
Howard  1  
1h Like Reply

 Angela Clifton Boehner  
Howard!!  1  
1h Like Reply


 Mishawn Lloyd  
Howard!!!  1  
1h Like Reply




 Aaron Felde  
Howard  1  
1h Like Reply

 Daisy Lippert-Martin  
Howard  1  
1h Like Reply

 Olga Bobko  
Howard  1  
1h Like Reply

 Michael Maloney  
Howard  1  
1h Like Reply

 Katie Resch  
HOWARD

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 Anita Potts  
Howard  
56m Like Reply


 Molly Ann  
Howard!!! We love you guys best place in  
town hands down!! 💕💕💕  
53m Like Reply




 Catrina Yanzick  
Howard  
52m Like Reply

 Cela Rose Trotchie  
Howard 🙌🏻🥰  
51m Like Reply

 Salena Warner  
Howard  
50m Like Reply

 Kiley Prendergast  
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49m Like Reply




 Jennifer Alley  
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"Howard"  
6h Like Reply

 Marie Rectenwald  
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38m Like Reply



 Kim Kenoyer  
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 Alena Cyr  
Howard 😊❤️  
29m Like Reply

 Vickie Reynolds

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22m Like Reply

 **Angela Clifton Boehner  
Howard!!**  1  
20m Like Reply


 **Mishawn Lloyd  
Howard!!!**  1  
18m Like Reply




 **Aaron Felde  
Howard**  1  
18m Like Reply

 **Daisy Lippert-Martin  
Howard**  1  
15m Like Reply

 **Olga Bobko  
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14m Like Reply

 **Michael Maloney  
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 **Katie Resch  
HOWARD**

 Write a comment...  

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Howard**  
9m Like Reply

 **Molly Ann  
Howard!!! We love you guys best place in  
town hands down!!** 💕💕💕  
6m Like Reply

 **Catrina Yanzick  
Howard**  
5m Like Reply




 **Cela Rose Trotchie  
Howard** 🙌🏻🥳  
4m Like Reply

 **Salena Warner  
Howard**  
3m Like Reply

 **Kiley Prendergast  
HOWARD**  
2m Like Reply

 **Jennifer Alley  
Howard**  
2m Like Reply

 **Jackie Harner**

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5 bd | 4 ba | 4,500 sqft

2101 Humble Rd, Missoula, MT 59804

● **Off market** | Zestimate®: **\$926,700** | Rent Zestimate®: **\$3,380**

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## Home value



Zestimate

**\$926,700**



Zestimate range

**\$834,000 - \$1.03M**



Last 30-day change

**+ \$18,247 (+2.0%)**



Zestimate per sqft

**\$206**



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5 bd | 4 ba | 4,500 sqft

2101 Humble Rd, Missoula, MT 59804

● **Off market** | Zestimate®: **\$926,700** | Rent Zestimate®: **\$3,380**

Est. refi payment: \$5,616/mo [\\$ Refinance your loan](#)

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An equal housing lender. NMLS #10287.

## Home value



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**\$926,700**



Zestimate range

**\$834,000 - \$1.03M**



Last 30-day change

**+ \$18,247 (+2.0%)**



Zestimate per sqft

**\$206**





Glidewell

4 hrs · 🌐



Congratulations **Alison Lokey Easter!** You have just won two Large pizzas from **Howard's Pizza Missoula** courtesy of **Glidewell**. Please send us a private Facebook message with your address, order and preferred delivery time. Thanks to everyone who participated. Please keep an eye out for our next giveaway.





**Glidewell**

Published by Brandon Smith [?]

[Like This Page](#)

Picking up dinner for this week's [Howard's Pizza Missoula](#) Giveaway winner! Congratulations [Alison Lokey Easter](#), dinner is on its way! - at [Howard's Pizza Missoula](#)

Tag Photo

Edit

Like

Comment

Share

6

[Chronological](#)



**Howard's Pizza Missoula** Great picture

[Unlike](#) · [Reply](#) · [Message](#) · 1 ·



Write a comment...





# Glidewell.

- 1) Enjoy Howard's Pizza.
- 2) Take picture of your family enjoying your pizza.
- 3) Post the picture on Facebook and tag Glidewell and Howard's Pizza.
- 4) Complete steps 1-3 and I will mail you a \$25 Starbucks gift card next week!

iMessage

Good evening, Alison. I hope you and your family enjoyed your 🍕 tonight!

Please let me know if there is anything more I can do to serve you.

Have an awesome weekend! 🦊

Brandon Smith  
@Glidewell.pro

Delivered





**Alison Lokey Easter** Thank you, **Glidewell** and **Howards Pizza Missoula!**  
Delicious!



Like · Reply · Message

Brandon Smith

ALISON-  
THANK YOU FOR POSTING THE PICTURE  
ON OUR FACEBOOK PAGE. IT APPEARS  
YOUR FAMILY ENJOYED THE PIZZA. PLEASE  
ENJOY YOUR FAVORITE CUP OF COFFEE, ON  
ME. HAVE AN AWESOME WEEK!



Glidewell.



ALISON EASTER  
2101 HUMBLE RD  
MISSOULA, MT 59804



# \$4,603.56



Kirk & Alison Easter - \$729.17

*(Home, Auto, Umbrella)*

Jim & Karen Meyer- \$2,159.60

*(Home, Auto, 2 DF, Umbrella, Medicare)*

Matt & Desi Meyer- \$555.90

*(Home and Auto)*

Montana Pizza DBA Howard's \$1,158.89

*(Commercial)*

$$\text{\$20} = \text{🍕} = \text{\$4,603.56}$$





Brandon

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Create



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Inbox

Appointments

Manage Jobs

Notifications 9

Insights

More ▾

Edit Page Info

Settings 7

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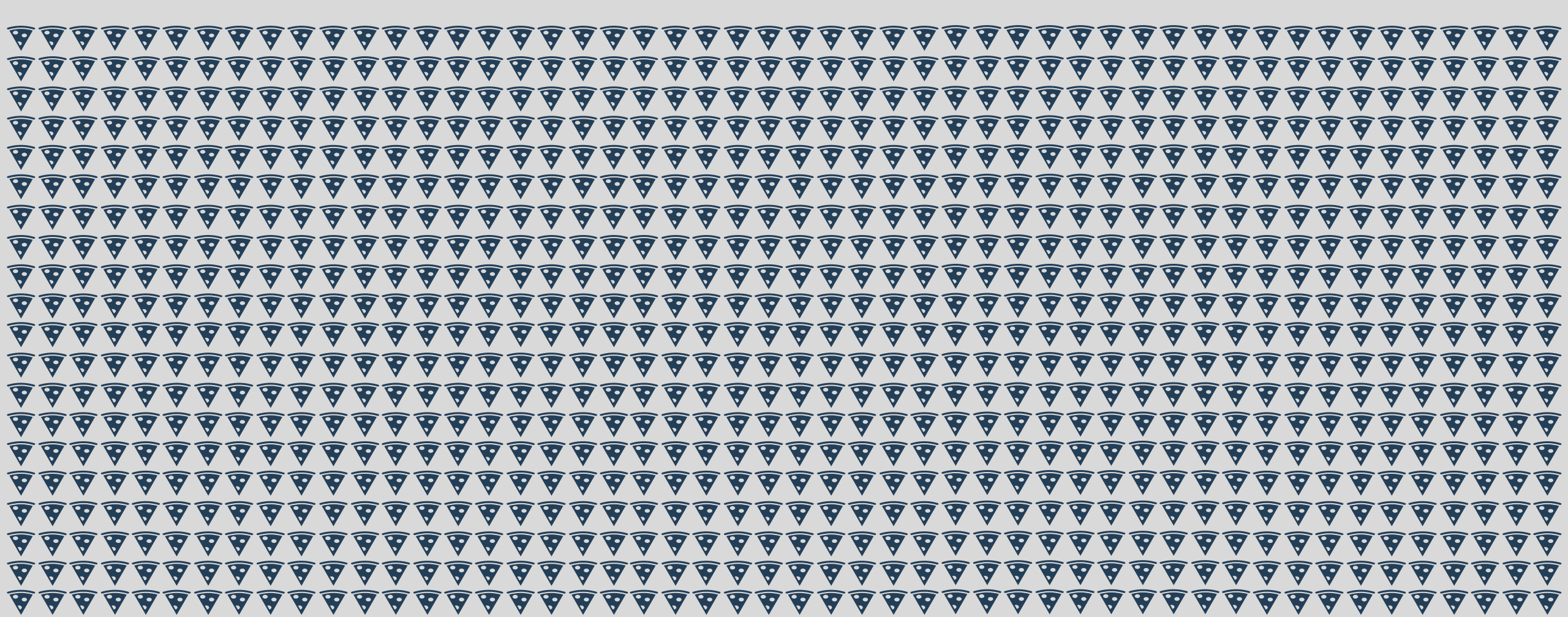
2,347

Total Likes

2,354

Total Follows

+354 followers



**\$20 =  = \$58,012.31**









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Our Principals

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WHAT WE DO

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Chairman and Principal

#### VCARD

#### FINRA'S BROKERCHECK



Thomas Brady started the company over 45 years ago in San Mateo, California. As Chairman of the company, Tom brings his decades of experience and successful relationships to uphold the firm's vision and strategic growth. In 2007 he applied this vision and opened our Boston office, expanding the company from a regional California business into a national practice. Tom is also responsible for leading the company's marketing initiatives and for maintaining high level client engagement and communications.

Tom started his career at New England Life in 1968, and after eight years moved on to start Thomas Brady & Associates, building the firm from the ground up based on the guiding principle of personalized service for each and every customer. His goal was to help families with their planning and insurance needs by delivering the same level of commitment that he provided to his own family. Today, while the firm has grown to service both individual and corporate clients, that same mission of trust and commitment remains.

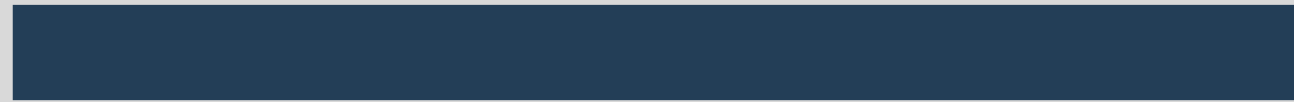
Tom has devoted much of his life to serving on numerous boards, from schools to non-profit groups to those in the public sector as well. A frequently sought out speaker, he has



GOAT

GREATEST OF ALL TIME

True greatness consists in being great in little things.



**Less than 30%** of agencies have an **equal** focus on new business and retention.

Acquiring a new customer can cost five times more **than retaining** an existing customer.





The average **retention** rate for the **insurance** industry is 83%, but the top agents in the industry are beating that average by 10% or more. A **retention** rate of 83% may sound great, but that means you're losing 17% of your customers per year.

\$1,000,000 in revenue  
\$250,000/year in new revenue  
**83% retention**  
5 years = \$1,285,221.62

---

\$1,000,000 in revenue  
\$250,000/year in new revenue  
**88% retention**  
5 years = \$1,511,623.76

\$1,000,000 in revenue  
\$250,000/year in new revenue  
**83% retention**  
5 years = \$1,285,221.62

---

**\$226,402.15**

\$1,000,000 in revenue  
\$250,000/year in new revenue  
**83% retention**  
5 years = \$1,511,623.76



**1 Policy**  
11 Months

**1 Policy**  
11 Months

**2 Policies**  
2.5 Years

**1 Policy**  
11 Months

**2 Policies**  
2.5 Years

**3 Policies**  
4.5 Years



**1 Policy**  
11 Months

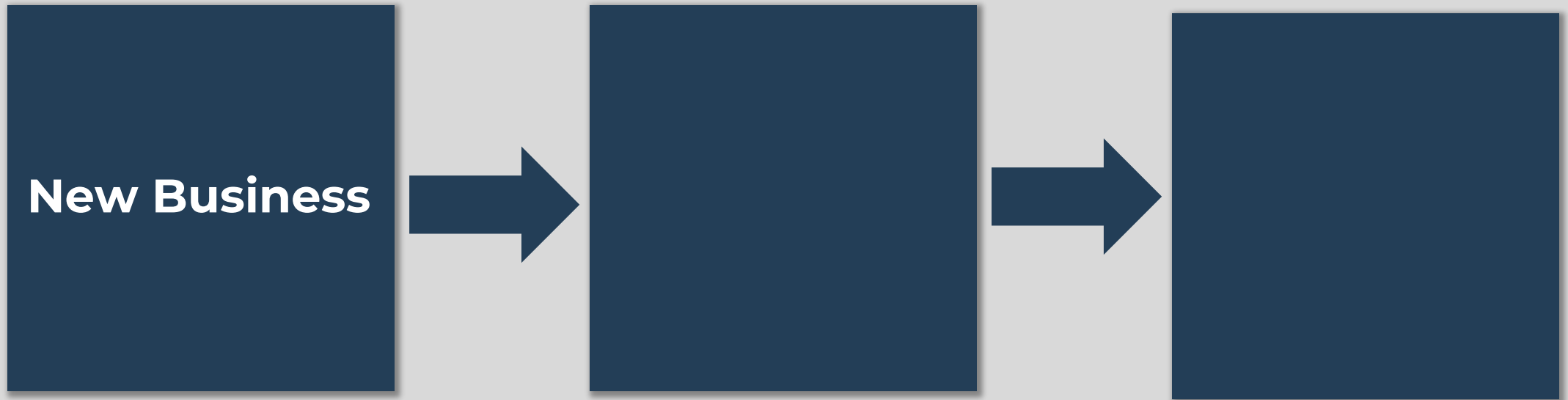
**2 Policies**  
2.5 Years

**3 Policies**  
4.5 Years

**4+ Policies**  
13 Years

# Retention

---



# Asking The Right Questions

Will make a **HUGE** difference!

Not only in making the sale but also in the **size** of the sale.

Asking the right sales questions is how you find what is most **important** to your prospect.

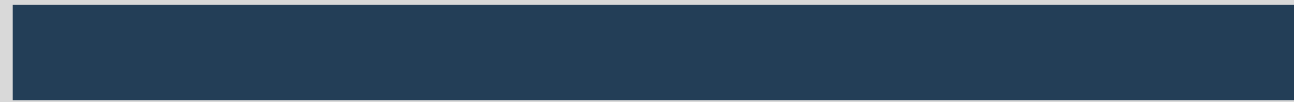


# Asking The Right Questions

1. How did that car handle last month's ice storm?
2. How did you decide on this make/model of car?
3. Do you know anyone who's been seriously hurt in a car accident?
4. Does that F150 have a tow hitch?

**If you want to change the world,  
go home and love your family.**

Mother Theresa



# Welcome to the Family

30 Day Onboarding Process



DAY	TASK
Day 1	Handwritten thank you card from producer

DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request

{Contact First Name}, Welcome to the Family! It is our pleasure to have you as a client and we look forward to a lasting relationship.

It's important  
sending  
improvement

I only have  
below,

How likely

0 - Not

[0 1

Thanks

Thank you for your response.

Question #2) What would it take for us to increase your score to an eight, nine or even a ten?

Your feedback is appreciated.

Submit



{Contact First Name}, Welcome to the Family! It is our pleasure to have you as a client and we look forward to a lasting relationship.

It's important  
sending  
improvement

I only have  
below,

How likely

0 - Not at all

0 1

Thanks

Thank you for the encouragement.

Question #2) Would you take a moment and leave us a FIVE STAR review?



[Google Review](#)



[Facebook Review](#)



**GlideWell**  
5.0 ★★★★★ (365) - Insurance agency - 40+ years in business  
Closes soon · 5PM · Missoula, MT · (406) 728-0793  
Provides: Car Insurance



[Website](#) [Directions](#) [Call](#) [Share](#)



**Toby Hansen Agency**  
4.6 ★★★★★ (20) - Insurance agency - 10+ years in business  
Closes soon · 5PM · Missoula, MT · (406) 721-8810  
Provides: Auto Insurance

[Website](#) [Directions](#) [Call](#) [Share](#)



**Cameron Amann at Comparison Insurance Agency**  
5.0 ★★★★★ (55) - Insurance agency  
Open · Closes 6:30PM · Missoula, MT  
"... experience made it easy and saved us alot on our rates on 8 cars"

[Website](#) [Directions](#) [Share](#)



**Summit Insurance Agency, Inc**  
4.7 ★★★★★ (9) - Auto Insurance agency - 10+ years in business  
Closed · Opens 9AM Tue · Missoula, MT · (406) 926-2552

[Website](#) [Directions](#) [Call](#) [Share](#)



**Insurance Unlimited**  
5.0 ★★★★★ (7) - Insurance agency - 5+ years in business  
Closes soon · 5PM · Missoula, MT · (406) 926-3606  
Provides: Car Insurance

[Website](#) [Directions](#) [Call](#) [Share](#)



**Farmers Insurance - Daniel Blowers**  
4.6 ★★★★★ (24) - Insurance agency - 7+ years in business  
Closes soon · 5PM · Missoula, MT · (406) 541-9885  
"We have needed commercial insurance certificates, bonding, auto ..."

[Website](#) [Directions](#) [Call](#) [Share](#)



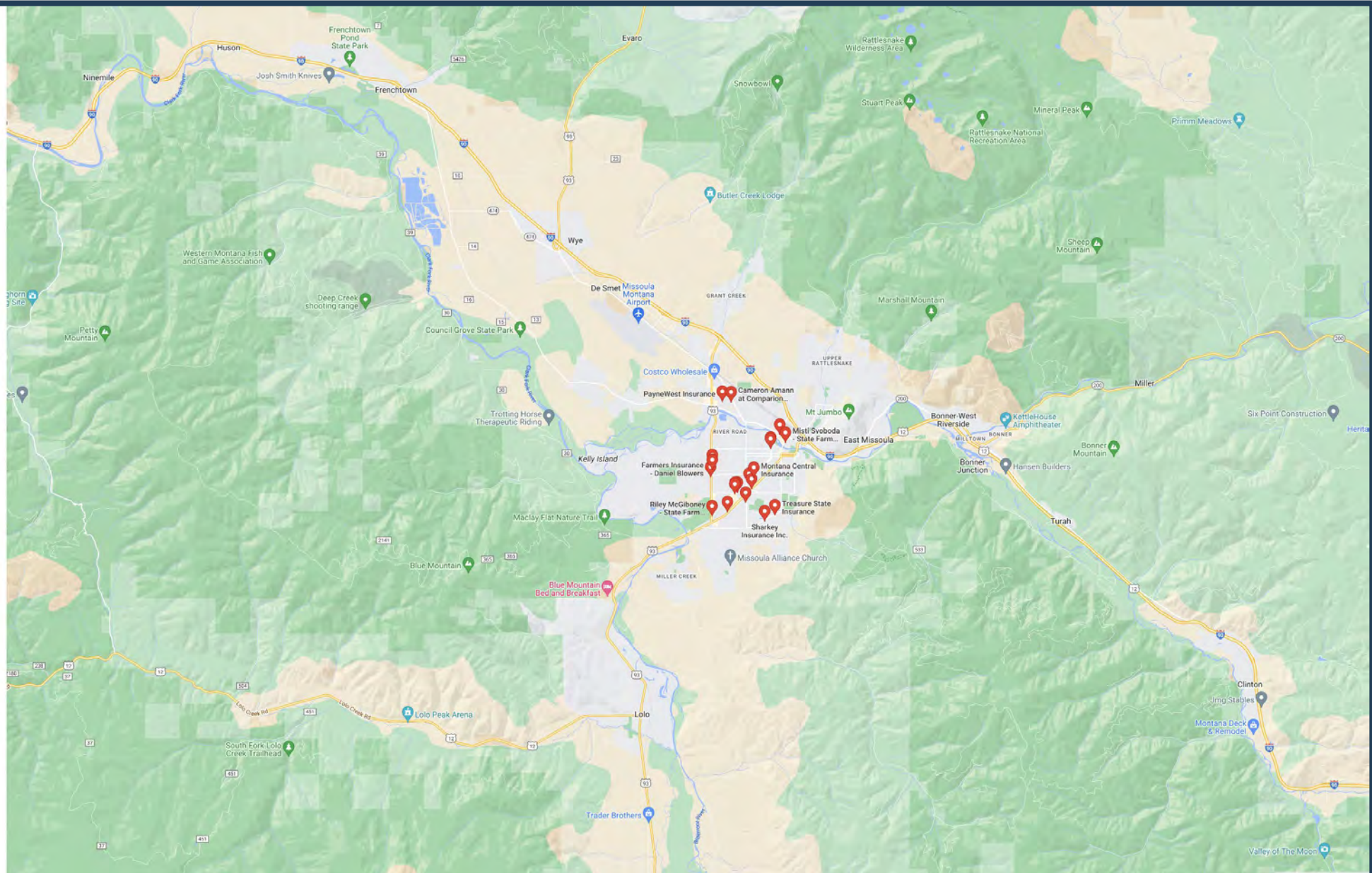
**Misti Svoboda - State Farm Insurance Agent**  
4.9 ★★★★★ (83) - Insurance agency - 3+ years in business  
Closes soon · 5PM · Missoula, MT · (406) 552-0730  
Provides: Car Insurance

[Website](#) [Directions](#) [Call](#) [Share](#)



**PayneWest Insurance**  
4.8 ★★★★★ (60) - Insurance agency - 10+ years in business  
Closes soon · 5PM · Missoula, MT · (406) 721-1000  
Provides: Personal Car Insurance

[Website](#) [Directions](#) [Call](#) [Share](#)

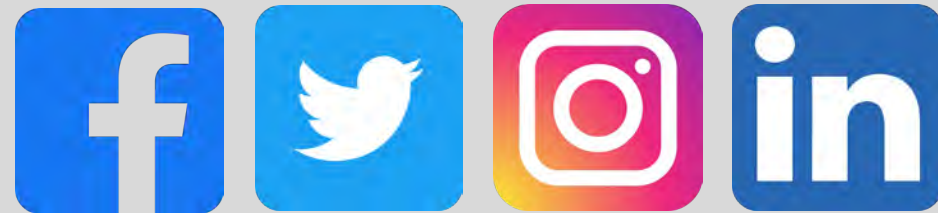


DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request
Day 3	Social Media Email



{Contact First Name}, thank you for taking the time to leave a review. Because you just did that, someone is going to have a better idea of what to expect when joining the [Glidewell](#) family. That's pretty helpful, so thanks a bunch.

Also, would you mind doing me a favor and follow Glidewell online? We love to share valuable content, customer reviews, and even do some giveaways on our different social media platforms.



Thank you for taking the time,

DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request
Day 3	Social Media Email
Day 5	Personal Phone Call

DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request
Day 3	Social Media Email
Day 5	Personal Phone Call
Day 7	Welcome Kit Text



## iMessage

Hi {Contact First Name}! It's Matt  
from Glidewell. Just wanted to let you  
know I've got a gift coming your way.  
Keep an eye on your mailbox. 📬 👁️👁️

DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request
Day 3	Social Media Email
Day 5	Personal Phone Call
Day 7	Welcome Kit Text
Day 10	Welcome Kit



Item	Price	My Cost
The Box	3.74	0.00
Total	\$3.74	\$0.00





Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Total	\$4.89	\$0.00



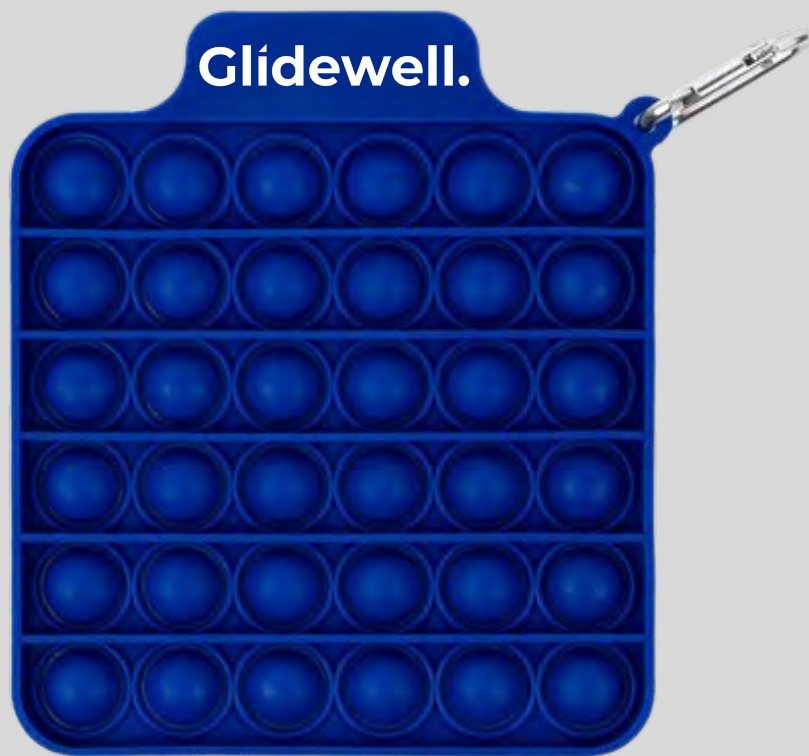


Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Our Guarantee	0.42	0.00
Glider	2.25	0.00
Total	\$7.56	\$0.00



Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Our Guarantee	0.42	0.00
Glider	2.25	0.00
Pen	0.90	0.00
Total	\$8.46	\$0.00





Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Our Guarantee	0.42	0.00
Glider	2.25	0.00
Pen	0.90	0.00
Pop It	1.99	0.00
Total	\$10.45	\$0.00

Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Our Guarantee	0.42	0.00
Glider	2.25	0.00
Pen	0.90	0.00
The Box	1.99	0.00
Note Card	1.95	0.00
Total	\$12.40	\$0.00

calldayspring.com | 800-555-3803

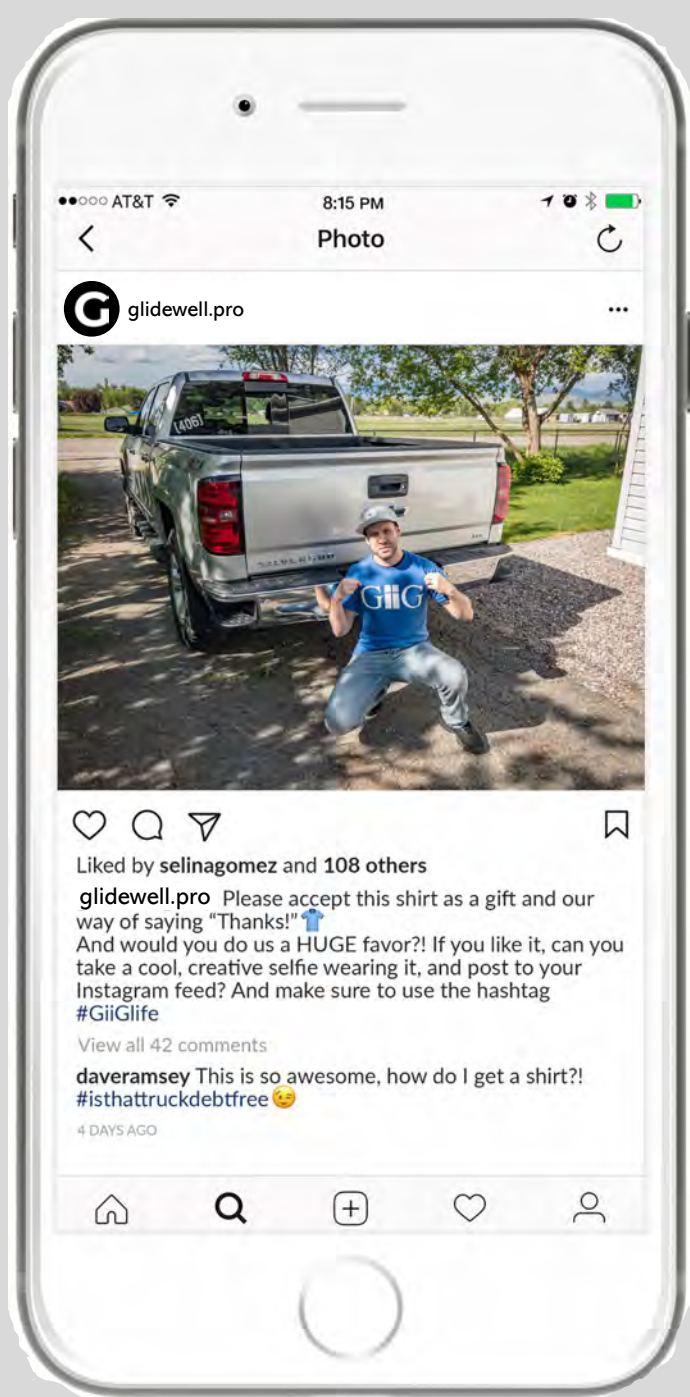
406.728.0793  
1750 South Avenue West  
Missoula, MT 59801  
[www.giiq.com](http://www.giiq.com)

Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Our Guarantee	0.42	0.00
Glider	2.25	0.00
Pen	0.90	0.00
The Box	1.99	0.00
Note Card	1.95	0.00
Brochure	0.84	0.00
Total	\$13.24	\$0.00



Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Our Guarantee	0.42	0.00
Glider	2.25	0.00
Pen	0.90	0.00
The Box	1.99	0.00
Note Card	1.95	0.00
Brochure	0.84	0.00
T-Shirt	8.96	0.00
Total	\$22.20	\$0.00





Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Our Guarantee	0.42	0.00
Glider	2.25	0.00
Pen	0.90	0.00
The Box	1.99	0.00
Note Card	1.95	0.00
Brochure	0.84	0.00
T-Shirt	8.96	0.00
Social Media	0.26	0.00
Total	\$22.46	\$0.00



Item	Price	My Cost
The Box	3.74	0.00
Meet The Family	1.15	0.00
Our Guarantee	0.42	0.00
Glider	2.25	0.00
Pen	0.90	0.00
The Box	1.99	0.00
Note Card	1.95	0.00
Brochure	0.84	0.00
T-Shirt	8.96	0.00
Social Media Card	0.26	0.00
Shipping	7.20	0.00
Total	\$29.66	\$0.00

**DAYSPRING RESTORATION, INC**  
**DBA KLEEN KING**  
5463 Trumpeter Way  
Missoula, MT 59808

First Security Bank  
PO Box 4506  
Missoula, MT 59806  
93-133/929

35375

01/21/2022

PAY TO THE  
ORDER OF GIIG

\$ \*\*3,000.00

Three Thousand and 00/100 \*\*\*\*\*

DOLLARS

GIIG  
1750 South Avenue West  
Missoula MT 59801

MEMO

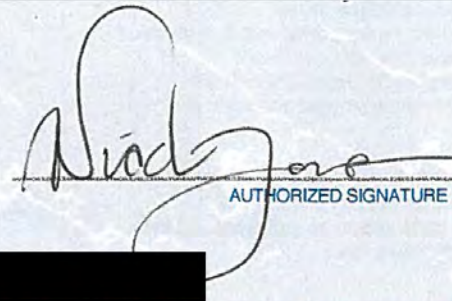
  
AUTHORIZED SIGNATURE

Photo Safe Deposit®

Details on Back.

DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request
Day 3	Social Media Email
Day 5	Personal Phone Call
Day 7	Welcome Kit Text
Day 10	Welcome Kit
Day 14	Insured receives carrier paperwork



DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request
Day 3	Social Media Email
Day 5	Personal Phone Call
Day 7	Welcome Kit Text
Day 10	Welcome Kit
Day 14	Insured receives carrier paperwork
Day 15	Did you get it?

Hi {Contact First Name},

Did you get the gift I sent?

I hope so!

Along with the fun stuff, you'll see the 3 G's....Grounded, Growth, and Glidewell. As part of the family, our next step is to make sure YOUR family is taken care of in the case of lost income.

When would you have 2-3 minutes to chat and figure out what the next step is for your financial success?

Be well.

DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request
Day 3	Social Media Email
Day 5	Personal Phone Call
Day 7	Welcome Kit Text
Day 10	Welcome Kit
Day 14	Insured receives carrier paperwork
Day 15	Did you get it?
Day 30	Referral Request

When asked on a scale of 1-10 how likely it is that you would recommend Glidewell to a friend or colleague you gave us a 10. Thank you so much! Your confidence in our team is greatly appreciated.

With that said, and now that you have a better feel for who we are, would you be willing to provide me the name and contact information for a friend or colleague?

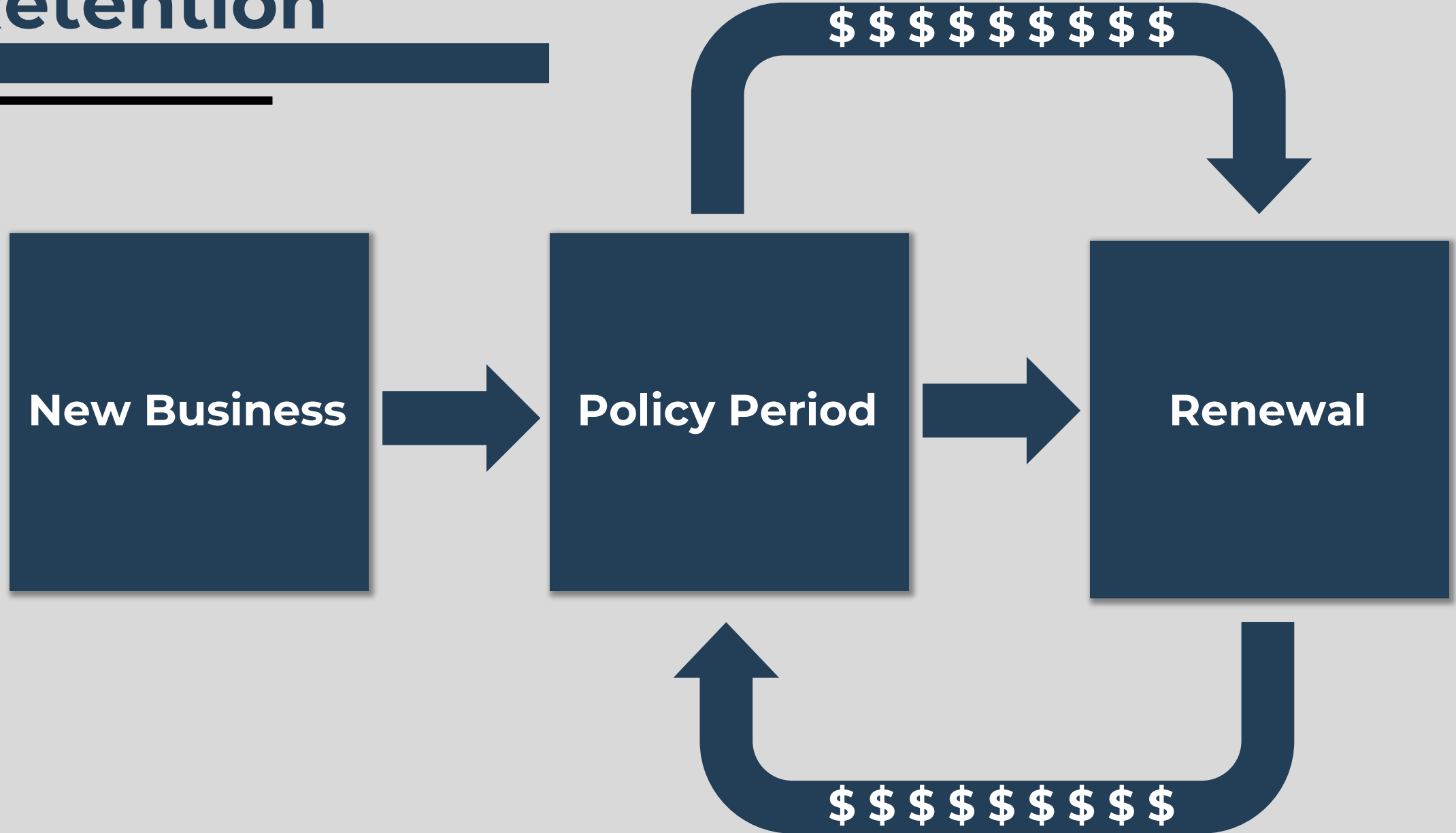




DAY	TASK
Day 1	Handwritten thank you card from producer
Day 2	Thank you email & survey request
Day3	Social Media Email
Day 5	Personal Phone Call
Day 7	Welcome Kit Text
Day 10	Welcome Kit
Day 14	Insured receives carrier paperwork
Day 15	Did you get it?
Day 30	Referral Request

# Retention

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Works Remote

Base Salary + Benefits

Bonuses based on KPIs

- *Retention*
- *Additional Policies*
- *Cross Selling*

**Wendy Nunnally**

*Retention Specialist*

Hello {First Name},

Like “Jumbo Shrimp”, “Insurance and Good News” may feel like an oxymoron...but I do have some good news regarding your policy that will renew in a few months.

As a customer of Glidewell, you automatically qualify for our **Renewal Protection Plan**.

This includes multiple benefits, including, you **DO NOT need to do anything regarding your renewal at this time**. Good news, right?

As a part of the Renewal Protection Plan – your policy will be reviewed to evaluate:

- Any price changes
- Any changes in coverage
- And, if your current carrier is still recommended.

Then...we will recommend:

- If a formal review is necessary
- Policy changes you may want to consider
- If your current carrier is still ideal

If you desire more information regarding this program, please click [here](#).



## Renewal Protection Plan

We verify that the insurance renewal being offered to you is the best option.

We Do The Work | Automatically Behind The Scenes | Each And Every Year

[Schedule An Appointment](#)

The *unfortunate truth* about Home and Auto insurance is this: **What you pay almost always increases at renewal.** There is a problem with this:



The **standard renewal process leaves you wondering** if the renewal being offered is best for you. But the problem is much deeper than the price...

Insurance is designed to financially replace things in the event of an accident or loss. And we live in a world where the cost to replace possessions goes up every day. As a result, the cost of insurance should increase from time to time. If it didn't increase the insurance company may not be doing its job correctly.

That said, as an independent insurance agency, we can evaluate your renewal offer against multiple insurance companies to determine if it is best for you. In price and in coverage. **The coverage part is key for you and your family's future.**

The world is constantly changing, and so is your life. You get more stuff or get rid of stuff. Your income or assets change. Your coverage needs change. So, your insurance may need adjustments.

If it doesn't cover your needs, why have insurance? This is why we have created our **Renewal Protection Plan. We make it easy for you to get your insurance needs protected, in price and in coverage, at renewal. The best part about this? You get this benefit automatically as a Glidewell customer.**



[Schedule An Appointment](#)

## What You Get



### A Dedicated Renewal Specialist

We have someone on our team that has the sole responsibility of managing renewals for our customers.



### Protection to the Price You Pay

We evaluate the price of your renewal to ensure it's still the best option for you and your family.



### Protection to Your Insurance Needs

We proactively ask you questions to ensure your renewal meets your coverage needs.



### Automatic Update on the Process

We will send you email and SMS notifications before, during, and after the renewal process.



### Smooth Transitions If Needed

If switching to one of our other carriers is the best option, we make the transition process super simple and fast.



### Confidence About Your Renewal

Sit back and relax knowing that you have a team of people working on your renewal each year.

## Do you want more from your insurance agent?

- Do you wonder if your insurance renewal is the best option?
- Are you given the opportunity to share how your life/needs have changed to ensure you have the proper insurance each year?
- Do you want a proactive Agent so you can focus on your family & carrier?
- Do you waste time on your insurance during renewal?
- Does your Agent check the price of other options and compare it to the price being offered to you at renewal?
- Do you want peace of mind knowing that you can have the best available insurance option?

[Schedule An Appointment](#)

This is a convenient renewal experience connected to your insurance needs. Now you can be confident about your insurance at every renewal.



Glidewell.

Tel. 406-728-0793

Email: [info@glidewell.pro](mailto:info@glidewell.pro)



Hi {First Name},

Next in your **Renewal Protection Process**, we will:

1. Analyze your coverage and explore options with other carriers. This includes ensuring your current carrier is providing the value in coverage that suits your needs.
2. Relay to you our recommendation to either continue with your current carrier or consider a new carrier for your renewal.
3. If you decide a change in carrier is needed, we will walk through the process together and make it as efficient as possible.

Thank you again for your business.

# Stay Recommended

Hi [First Name],

Again, **THANK YOU** for trusting Glidewell with your insurance needs.

Upon reviewing your [Safeco] policy that renews on [6/23/2023] with a renewal rate of [\$1,231.00], we highly recommend you stay with your current carrier.

Click **HERE** to  
accept renewal.

Have questions?  
Click **HERE** to  
schedule a call.

Sincerely,

Wendy

P.S. If you have any questions regarding your policy or the renewal process, please **CLICK HERE** to access my calendar and schedule a time to visit. It is important to me that you have peace regarding your renewal.



Wendy Nunnally

## Insurance Review

 30 min

 Phone call

During this call we will discuss the policy including coverage, premium, etc. and explore options for any necessary changes. We will also explore any other areas of opportunity for savings.

[Cookie settings](#)

### Select a Date & Time

October 2022



SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

#### Time zone

 Mountain Time - US & Canada (11:32am) ▾



Troubleshoot

POWERED BY  
**Calendly**



# Change Recommended

Hi [First Name],

Again, **THANK YOU** for trusting Glidewell with your insurance needs.

We have completed your renewal review and we have a different carrier for you to consider that might provide a policy better suited for your budget and current situation.

We highly recommend you move your [Auto] policy to [Travelers] by your [6/23/2023] renewal. I've attached the new proposal for you to review at your convenience. This policy will save you [\$501.00] per year.

Click **HERE** to start making the change.

Have questions?  
Click **HERE** to schedule a call.

Click **HERE** to stay with current carrier.

I look forward to hearing from you.



Wendy Nunnally

## Finalizing Policy

 15 min

 Phone call

During this appointment, we will discuss any final details and arrange payment for the new policy.

[Cookie settings](#)

### Select a Date & Time

POWERED BY  
Calendly

October 2022



SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

#### Time zone



Mountain Time - US & Canada (11:40am) ▼



Troubleshoot

Life, Health, Medicare =	\$38,533.20
Wealth Management =	\$11,040.00
P&C Account Rounding =	\$12,248.88
	<u><b>\$61,822.08</b></u>

Retention = **86.3% to 89.7%**

Some agents want it to happen.  
Some wish it would happen.  
Others make it happen.

**GO BE THE GOAT.**

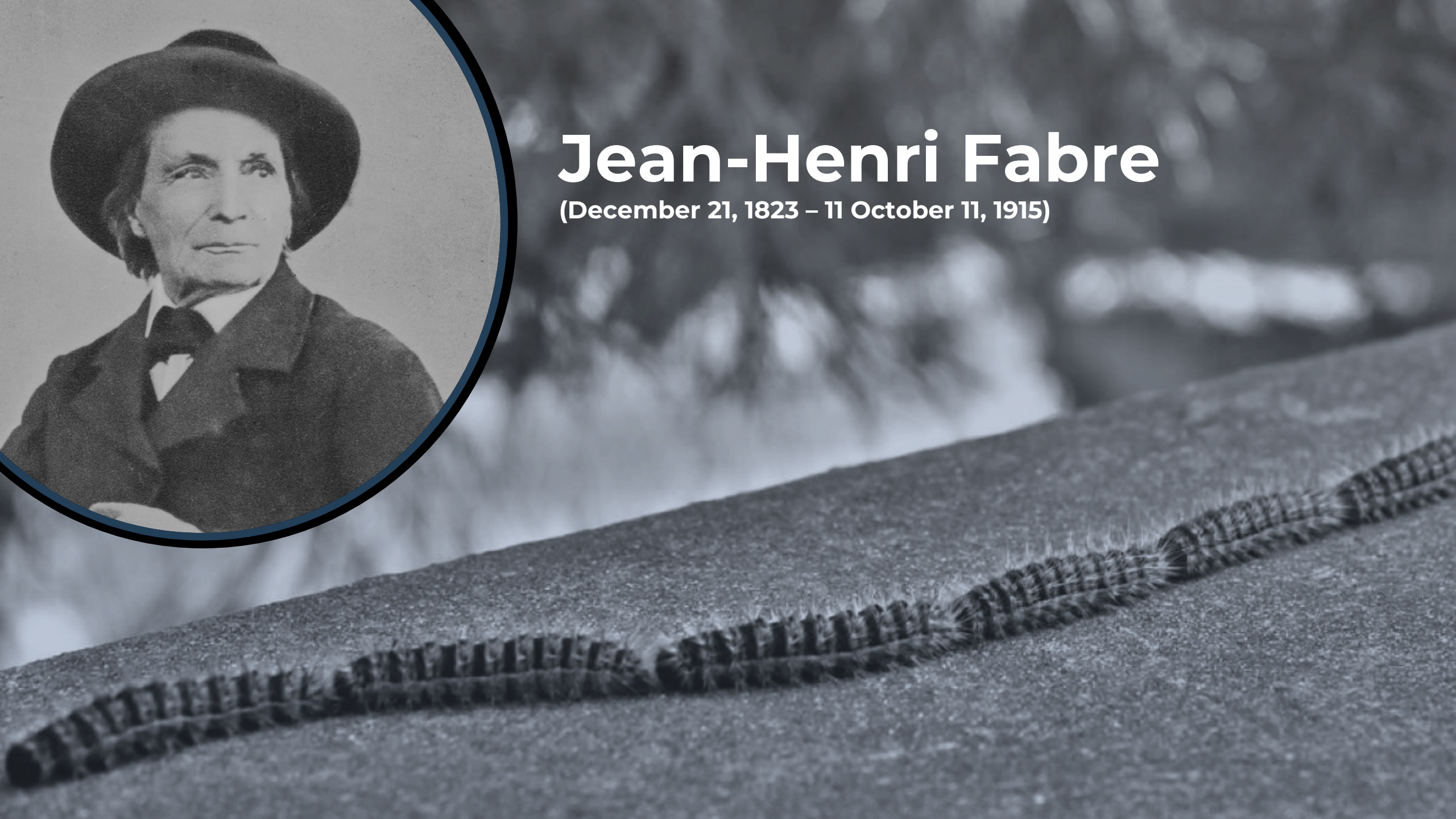
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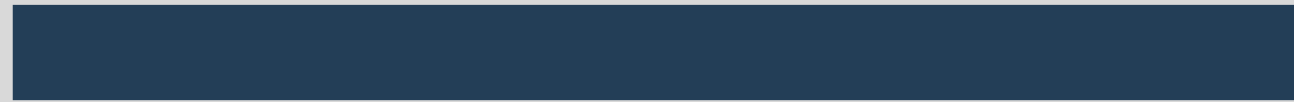


# Jean-Henri Fabre

(December 21, 1823 – 11 October 11, 1915)



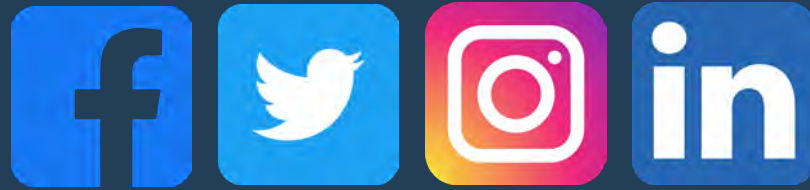
WTF: **Wow, that's fun!**







**LET'S  
CONNECT.**



**@brandon5mith**





2023

A dark blue silhouette of the Bowling Green skyline is positioned behind the main text. It features a prominent water tower on the right, a tall spire in the center, and various other building shapes.

# LEADERSHIP CONFERENCE

BOWLING GREEN, KY • MAY 15-17