

Basics of Selling

May 16th 2023

THREE/ARBOR
INSURANCE





Who/What/Why is David Foster?

Core Values

Relationships

We KNOW each other

Response

No one responds FASTER

Transparency

We are REAL.

Vision

We are a place that YOU are seen and heard

2023 KPIs

- 5-10 Meetings a week
- 2 Opportunities a week
- Customized cold call plan
 - STOP COACHING EVERYONE THE SAME

Rinse and Repeat

- Political Non-Profit
 - Contractors
 - Technology
 - Healthcare
 - Real Estate
 - Food Service
-
- This is how you can compete with any agency out there. Period!!!!

Let's get REAL

- Is anyone tired of producers not validating?
- STOP SENDING GREEN PRODUCERS INTO THE GENERAL BLACK HOLE
- We have half ass sales processes based on old data
- 100k revenue isn't that good for commercial focused agency
- How do we get our best more shots!!!

Qualify Qualify Qualify

- I'm sick and tired of seeing people waste their time
- 90% of insured stay with incumbent
- What is your agency go to qualifying line?
 - Are you willing to fire your agent?
 - Are you married to your agent?
- Use your brain!!!!!!
 - If someone is shopping don't start dancing for them
 - Use your filters: decision maker, premium, why, markets, goal
- Everyone wants to talk to the hot girl at the bar!!!!

I want all my ALLSTARS being ALLSTARS

- Associate Producer road map
- Marble Box
- Ascend
- Qwillr
- LRP
- And many more!!!!

Case Studies

- Roofer in ATL
- Non Profit in DC
- Multi location restaurant in AL
- Hospital in TN

Closing Remarks

- Never been a greater time to be an IA
- Don't chase revenue, chase JOY
- ITS REALLY NOT THAT HARD
- Don't forget your WORTH!!!!

- David Foster
- Dfoster@threearbor.com
- 205-296-0404

DOOR PRIZES SPONSORED BY

Gold Level Sponsors

Acuity Insurance

Secura Insurance Companies

Summit

Risk Placement Services, Inc.

Keystone Insurers Group

Fortified

First Benefits Mutual

BondExchange

Liberty Mutual, Safeco, State Auto

Silver Level Sponsors

Bolton & Company

Kentucky Growers Insurance

Midwestern Insurance Alliance

BIG I

KENTUCKY

2
0
2
3



LEADERSHIP CONFERENCE

BOWLING GREEN, KY • MAY 15-17