

STATE AUTO
Insurance Companies



Welcome!

July 2014 PaceSetter Class Orientation Call

FINANCIAL STRENGTH | REPUTATION | RELATIONSHIPS | RELIABILITY | RESPONSIVENESS

Introductions



Your PaceSetter Team
Administrator: Bridgette Brodbeck, Coaches: Diane Masterson, Ken Fields & Pam Kusma

STATE AUTO
Insurance Companies

Your PaceSetter Year!

Commitment

Dedication

Hard Work

STATE AUTO
Insurance Companies

Commitments



PaceSetter Sales System

Prospecting

- 1st Q Weekly Goals
 - 40 CL X-dates
 - 20 Drop-ins
 - 2 Connection 100 Appointments
 - Networking Group
- 2nd Q Weekly Goals
 - 3-5 New Appointments
 - 20 Drop Ins
 - 10 CL X-dates
 - 3 Connection 100 Appointments

Weekly Coaching Calls

Blitz Days

Quarterly Conference Calls

Salesforce.com



Salesforce.com – Sales Reporting System



- On "the cloud"
- All leads loaded into Salesforce
- Track all prospecting and sales activity
- Individual & Class Reports
- Calendar



salesforce Platform

Commitments

Calendar

- Your PaceSetter Year is already planned
- Key dates for year
- PaceSetters Salesforce Calendar
- Sponsors Outlook Calendar



Dedication

Prior to the conference:

- Pre-conference assignments
- Time away to attend the 2-week conference

When you return from the conference:

- 10-12 hour days + weekend time
- Follow the PaceSetter Sales System
- 52 weeks of coaching
- Become a student of sales



Hard Work

- Be very disciplined
- Sell All Day; App All Night

Out of the office prospecting:

50% of your day 1st Quarter

70% of your day 2nd, 3rd & 4th Quarter



Benchmarks

3 Months

- 520 CL X-dates
- 240 Drop Ins
- 26 C100 Appointments
- 13 Coaching Calls
- Update Salesforce

6 Months

- Complete all prospecting activities
- Premium requirement to remain in program
 - \$20,000 in SA premium or \$100,000 total premium including SA
- Mid Year Class Reunion
 - Attendance required



Mid Year Class Reunion



- Super Producer Round Robin
- Social Media
- Sales strategy discussions with Super Producers



PaceSetter Contract

1. Attend entire Producer Development Conference & Mid Year Class Reunion.
2. Participate in weekly coaching calls.
3. Update Salesforce weekly
4. Give SA first look at all eligible business.
5. Walk away from all accounts already placed with SA.
6. Not participate in other company-sponsored training/marketing effort or sales incentive programs.
7. Not be out of the office more than 5 days for CE, golf outings...
8. No minimum accounts size.
9. Use Monoline WC markets
10. No decrease in pay during PaceSetter year.



Rewards For Your Hard Work

- Quarterly Incentives
- Fee Refund
 - \$100,000 = 100%
 - \$75,000 = 75%
 - \$50,000 = 50%
- Cruise Incentive



Caribbean Cruise

- Qualify based on SA premium
- \$50,000 you qualify
 - (\$600 guest buy-in)
- \$75,000 you qualify
 - (\$300 guest buy-in)
- \$100,000 you and guest qualify
- ++\$300,000 luxury suite



Commitment Form

- Sign and return by May 23 3:00 p.m. EST
- Confirms your place in the class

EMAIL TO: FacilitatorExam@stateauto.com by Friday, May 23rd, 3:00 p.m.

I have read the following and agree to comply with these provisions for the 52 week period following the Facilitator Producer Development Conference. I also understand payment must be postmarked by May 23rd to be confirmed into the July 2014 Facilitator program.

Date: _____

Agency Name: _____ Code # _____

Sponsor Name: _____ (State.prm)

Signature: _____

Facilitator Name: _____ (State.prm)

Signature: _____

- Sponsor: If your plans change and you can no longer attend the sales management seminar, we'll reschedule you and your candidate into a future class.



Producer Development Conference

July 14 – 25, 2014





Conference Packet

July 2014 Class PaceSetter,

Welcome to PaceSetter! This information packet will help you prepare for a productive and enjoyable stay in Columbus.

Pre Class Assignments & Due Dates

- Agent's Time Analysis Worksheet (keep log for 5 to 6 working days – bring to Conf.)
- **May 21:** PaceSetter Orientation Phone Conference – 10:00 AM (ET)
- **May 23:** Sign and Return 1st Page of this Conference Packet by 3:00 PM (ET)
Payment must be postmarked by this date
Order Self-Study Courses (if not already ordered.)
- **June 16:** Completed Connection 100 Spreadsheet
Travel Form
SWOT Analysis
- **June 25:** Mail Merge Training Session
- **July 3** - Print Pre-Approach Letters and Connection 100 Letters (to be mailed by your agency while you are in Columbus)
- **July 7** - Self-Study Course work and on-line exams Completion Date
- **July 8** - Dynamics of Selling Webinar – 3:00 to 4:30 PM (ET) – Traits of Super Producers
- **July 10** - Dynamics of Selling Webinar – 3:00 to 4:30 PM (ET) – Personality Styles

Here is the link to the above pre-class assignments.

<http://pacesetter.stateauto.com/conferencepacket.asp>

What to bring to Columbus

Laptop – be sure you have logged into your Salesforce account and followed their “activation” process.

SWOT Analysis

Time Analysis Worksheet

Prospect Call List – directions will be emailed to you a week before you come to Columbus.

Transportation to Columbus

- You must *arrive at the hotel in Columbus, by 4:00 p.m., Sunday, July 13*. The conference concludes at noon on Friday, July 25. *Please schedule your flight home after 2:00 p.m.*
- Complete the Travel Form by June 16th.

If Flying to Columbus:

- Make your airline reservation no later than June 1. Use services such as Expedia or Hotwire to be sure you receive the most economical flight.
- If the airfare is more than \$450, contact Bridgette Brodbeck (ext. 4490) **before** booking the flight. Southwest Airlines typically offers savings on their airfares.
- Take a taxi from the Columbus International Airport to the Sheraton Columbus (75 East State Street, downtown Columbus). The cost is approximately \$26.00, including tip. We will include a \$26 taxi allowance in your travel allowance check.

If Driving to Columbus:

- We provide a travel allowance of 56.5 cents per mile to and from Columbus. Use Mapquest.com to calculate the ground mileage from your city of residence to Columbus and put this mileage on your Travel form.
- Use Valet parking at the hotel.

Travel Allowance Policy

We reimburse the lower of airfare or mileage. Compare the ground mileage from your residence city to Columbus and the airfare to and from Columbus, Ohio. You may use Mapquest.com to calculate the ground mileage from your city of residence to Columbus and an internet service, *such as* Expedia.com or Orbitz.com, to calculate the cost of an airline ticket.

A travel allowance check will be mailed to your agency sponsor within six weeks after you've completed the conference. **If you are responsible for your own travel expense, please let us know on the travel**

Where You'll Be Staying

Overnight accommodations have been made for you at:
Sheraton Columbus at Capitol Square
75 East State Street
Columbus, OH 43215
www.sheraton.com/columbus

State Auto pays for your room, tax, and parking during the conference. You are responsible for any additional charges, such as movies, laundry, and personal phone calls.

Please note:

1. The hotel provides complimentary services for:
 - guest room internet
 - shuttle service within the downtown business community (check with the front desk regarding distance, times and availability)
 - Fitness Center
 - phone service – local and long distance within the continental US
 - access to Regency Club Room, 20th floor, every day
2. We recommend you use a credit card when you check in to the hotel. If you use a debit card, the hotel will place a \$100 hold on your card to cover any incidental charges to your room. Any unused funds will be credited back to your card 3 to 7 business days after you checkout.

Meals:

Please let us know before you come to Columbus if you have any special dietary needs.

Weekday Meals

Breakfast and lunch are provided at State Auto. You will be given a lunch coupon for each day to off-set the cost.

Weekend Meals

Breakfast:

State Auto – Saturday, July 19th

Sheraton Columbus at Capitol Square – Sunday, July 20th

Transportation from Hotel to State Auto:

Special arrangements have been made to provide daily transportation to and from the Sheraton and State Auto during the week. **Because parking is limited, you are not to drive your personal car to State Auto, except for the last day of the program. The first morning of class (Monday, July 14), please meet at the Sheraton street level on Town Street no later than 7:00 a.m. There will be signs to direct you. If you miss the shuttle, call a taxi by dialing (614) 444-4444. This will be at your own expense.**

Conference location:

State Auto Headquarters
518 East Broad Street
Columbus, OH 43215

PaceSetter Class Agenda

Sunday 7/ 13, 6:00-7:00 p.m.

PaceSetter Kickoff – The Sheraton Columbus at Capitol Square – Congressional Room – 1st Floor

Dress: Casual

7/ 14 – 7/ 19 Monday-Friday

8:00 a.m. - 5:00 p.m.

- CL Insurance Training
- Underwriting Principles
- Coverage Analysis
- Final Exam
- My Loss Runs Training

Saturday

7:30 a.m. – 1:00 p.m.

- Prospecting Strategies

7/ 21 – 7/ 25 Monday-Thursday

8:00 a.m. - 5:00 p.m.

- Dynamics of Selling
- CL Telemarketing
- Time Management
- Salesforce Training

Friday

8:00 a.m. - 12 noon

- Role Play

Sponsor Class Agenda

7/ 21 – 7/ 23 Monday-Tuesday

8:00 a.m. - 5:00 p.m.

- Dynamics of Sales Management
- DISC
- Managing producers
- Producer Compensation
- Managing Agency Resources
- Coaching with the PaceSetter Sales System
- CIC update (National Marketing Alliance requires 100% attendance at all sessions.)

Wednesday

8:00 a.m – 12:00 p.m.

Zero Tolerance Policy While in Columbus

- Tardiness (1st time we warn, 2nd we contact agency, 3rd sent home)
- Miss Class (1st time we send home)
- There are no excused absences other than personal illness requiring medical attention.
- **No time to conduct business during breaks.**

Dress: Business Casual

Men – collared shirts, “Dockers” style pants or dress pants, sweaters/sweater vests, sport jackets.

Women – blouses, sweaters, jackets, slacks or skirts.

Weekend Between Classes:

Please keep in mind the following during this weekend.

- You are not permitted to go home over the weekend. You may, however, want to consider having your family join you over the weekend.
- You will have breakfast at State Auto on Saturday and at the Sheraton on Sunday. Lunch and evening meals are on your own.
- There is class on Saturday morning from 7:30 AM to 1:00 PM. No, you cannot leave early for any reason.
- There are no excused absences from Saturday morning class, other than personal illness requiring medical attention.

State Auto's Smoking Policy

State Auto is a smoke-free environment. This means smoking is not permitted anywhere on our premises or grounds. In addition, the city of Columbus does not allow smoking in any public places such as restaurants, bars, etc.

Special Needs

State Auto's building facilities are in compliance with the Federal Americans with Disabilities Act. Please let us know of your special needs.

Communication with PaceSetter Team

Check e-mail twice a day minimum
Respond as quickly as possible

Important Phone Numbers:

In case of an emergency, your family members and business associates may contact you at the following numbers:

State Auto: 800-444-9950, Ext. 4490
Sheraton Columbus at Capitol Square: 1-614-365-4500
Bridgette: State Auto 800-444-9950, Ext. 4490
Ken: (614) 395-7019
Diane: (614) 361-2883

EMAIL TO: PaceSetterTeam@stateauto.com by Friday, May 23rd, 3:00 p.m.

I participated in the PaceSetter Orientation Conference Call and agree to comply with requirements of the Producer Development Conference and the provisions for the 52 weeks following the conference. I also understand payment must be postmarked by May 23rd to be confirmed into the July 2014 PaceSetter program.

Date: _____

Agency Name: _____ **Code #** _____

Sponsor Name _____
(please print)

Signature: _____

PaceSetter Name: _____
(please print)

Signature: _____

PACESETTER FINAL CONFIRMATION

After the PaceSetter Orientation Conference Call, please complete and email this page confirming your commitment to The PaceSetter Program.

***** Sponsors:** If your plans to attend the sales management seminar should change, please notify us right away so we can schedule you and your candidate into a future class.***

***** PaceSetter:** If there is any doubt on your part of your willingness to commit to the rigors of the PaceSetter program, please let us know no later than Friday, May 23rd, 3:00 p.m. ET, and we will withdraw you from the class without penalty