

FAX TO: 614-719-0210 by Wednesday, December 5, 2012, 3:00 p.m.

I have read the following and agree to comply with these provisions for the 52 week period following the PaceSetter Producer Development Conference. I also understand payment must be postmarked by December 7 to be confirmed into the January 2013 PaceSetter program.

Date: _____

Agency Name: _____ **Code #** _____

Sponsor Name _____
(please print)

Signature: _____

PaceSetter Name: _____
(please print)

Signature: _____

PACESETTER CONFERENCE PACKET

Please complete and fax back this page confirming your commitment to The PaceSetter Program.

**This conference packet will be reviewed during the December 3
PaceSetter Orientation Phone Conference - 2:00 PM (EST)**

January 2013 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.

If there is any doubt on your part of your willingness to commit to the following provisions, please let us know no later than Wednesday, December 5, 3:00 p.m., and we will withdraw you from the class without penalty.



January 2013 Class PaceSetter,

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

You are tentatively confirmed for the January 2013 PaceSetter Program which begins with the Producer Development Conference January 28-February 8, 2013.

Conference location:

State Auto Headquarters, Pavilion Training Center, 518 East Broad Street, Columbus, OH 43215

Opening Introductions

- Coaches
 - o Ken Fields
 - o Diane Masterson
- Program Administrators
 - o Luanna Matthews
 - o Bridgette Brodbeck

Licensing

- Must be a licensed agent
- Must be appointed with SA

CONFERENCE PACKET - Pre Class Assignments & Due Dates

- Agent's Time Analysis Worksheet (keep log for 5 to 6 working days – bring to Conf.)
- **December 3**
 - PaceSetter Orientation Phone Conference – 2:00 PM (EST)
- **December 5**
 - Return Signed 1st Page of this Conference Packet by 3:00 PM (EST)
 - Order Self-Study Courses (if not already ordered.)
- **January 9**
 - Salesforce Mail Merge Training and Pre-approach Letter Templates
 - Travel Form
 - Connection 100 Spreadsheet and Letter Template
 - SWOT Analysis
- **January 18** - Print Pre-Approach Letters and Connection 100 Letters (to be mailed by your agency while you are in Columbus)
- **January 21** - Self-Study Course work and on-line exams
- **January 22** - Dynamics of Selling Webinar – 3:00 to 4:30 PM (EST) – Traits of Super Producers
- **January 24** - Dynamics of Selling Webinar – 3:00 to 4:30 PM (EST) – Personality Styles

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

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

Bring With You

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.

Travel Guidelines

If your drive time exceeds 5 hours, you may consider flying.

Scheduling Flights to Columbus

If flying:

Please use State Auto’s travel service, Professional Travel, Inc., to make your flight reservation.

**Dial: 877-232-6111 and press ext. 5 for the group department
Group Number: 12713CMHST**

Transportation from Airport to Hotel

Plan to 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. **Print your name on the back of the receipt and give it to Bridgette Brodbeck on the first day of class for reimbursement.**

Driving Instructions

If driving:

The Travel Form is to be completed by January 9. **We provide a travel allowance of 50 cents per mile to and from Columbus.** Use Mapquest.com to calculate the ground mileage from your city of residence to Columbus.

A travel allowance check will be mailed to your agency sponsor within 30 days after you’ve completed the conference. **If you are responsible for your own travel expense, please let us know on the travel form.**

Once you arrive at the Sheraton Columbus at Capitol Square, please be sure to use valet parking.

Lodging:

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 will pay 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 is providing the following complimentary services:
 - guest room internet
 - shuttle service within the downtown business community (check with the front desk regarding distance, times and availability)
 - long distance phone calls within the continental US
 - local and 800 phone calls
 - 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:

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.

Evening Meals are on your own.

Weekend Meals

Breakfast:

State Auto – Saturday, February 2.

Sheraton Columbus at Capitol Square – Sunday, February 3.

Lunch and Evening Meals are on your own.

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, January 28), please meet at the Sheraton street level on Town Street no later than 6:50 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.**

Laundry Service

Hotel laundry service is from Monday-Saturday. Any laundry turned in by 9 am will be returned by 5 pm the same day. Laundry turned in after 9 am, will not be returned until the following afternoon. Weekend laundry turned in after 9 am on Saturday will be returned Monday afternoon.

Fitness Center

Guests of the Sheraton have complimentary access to the on-site Fitness Center on the 22nd floor.

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.

Please let us know of any special dietary needs, such as diabetic, vegetarian, etc.

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. 4931

Sheraton Columbus at Capitol Square: 1-614-365-4500

Luanna: State Auto 800-444-9950, Ext. 4931

Bridgette: State Auto 800-444-9950, Ext. 4490

Ken: (614) 395-7019

Diane: (614) 361-2883

Class Agenda

Sunday 1/27, 6:00-7:00 p.m.

PaceSetter Kickoff – The Sheraton Columbus at Capitol Square – Regency Club Room – 20th Floor

Dress: Casual

Monday 1/28, 6:50 a.m. shuttle leaves the hotel for Welcome Breakfast at State Auto

Dress: Business Casual

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

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

While in Columbus - Class Sessions

1st Week	Monday-Friday	8:00 a.m. - 5:00 p.m.
	Saturday	7:30 a.m. - 1:00 p.m.
2nd Week	Monday-Thursday	8:00 a.m. - 5:00 p.m.
	Friday	8:00 a.m. - 12 noon

Please leave evenings open for class assignments.

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.**

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.

Week 1: Monday, January 28-Friday, February 1

PaceSetter Producer Development Conference

- CL/PL Insurance Training
- Underwriting Principles
- Coverage Analysis
- Final Exam

Weekend Between Classes:

Please keep in mind the following during this 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.
- You are not permitted to go home over the weekend. You may, however, want to consider having your family join you over the weekend.

Week 2: Saturday, February 2-Friday, February 8

PaceSetter – Sales Week

- Prospecting Skills (Saturday 7:30 a.m. – 1 p.m.)
- Dynamics of Selling (February 4-6)
- CL/PL Telemarketing
- Time Management
- Role Play

PaceSetter Sponsor Sales Management Seminar (February 4-6)

Reminder: Your attendance is required unless you've attended since August 2005.

- Includes hotel, breakfast and lunch, and for those who attend every session, a travel allowance.
- 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.)

PaceSetter Year

- Calendar Events – automatic scheduling through Salesforce for PaceSetters
- Calendar Events – automatic scheduling through Outlook for Sponsors

PaceSetter Sales System

Prospecting

- SA secures leads, agency produces letters and mails letters (to be explained under Salesforce section)
- Prospecting requirements: CL - 50 x-dates a week; PL - 20 x-dates a week, Average of 13 Centers of Influence Appointments a week
- PaceSetter enters activities (x-dates, drop-in visits and so forth)
- Connection 100 – enter 100 names, addresses in Excel Spreadsheet. CL – 2 per week, PL 3 per week.
- Networking group
- Use of cell phones; car and associated cost

Coaching

- Weekly phone coaching
- Discuss prospecting & sales activities
- PaceSetter should be working 10 – 12 hr days
 - o Sell All Day; App All Night
- 3 unexcused missed appointments, subject to withdrawal (includes coaching, blitz & class conference calls)
- Discourage call-ins (CL only)
- Sponsors participate in quarterly phone conferences
- Report cards

Sales Blitz Days

- Sponsor and PaceSetter
- Scheduled days
- Prospect together
- Report results

Reporting System – Salesforce.com

- Internet-based reporting site; customized for PaceSetter Program
 - All leads are loaded into Salesforce
 - Connection 100 contacts are loaded into Salesforce
 - Pre-approach letters are prepared and mailed by agency
 - PaceSetter tracks all prospecting
 - Training
 - Individual and Class reports are on this system
 - Calendar
-

Benchmarks - subject to withdrawal if not met

- 3 Months: CL PaceSetters - 650 x-dates; 240 Drop-ins, 26 C-100 Appointments, PL PaceSetters – 260 PL & CL x-dates from business stop-ins, and 120 Centers of Influence Appointments
- 6 Months: meet prospecting requirements and write \$20,000 State Auto premium or \$100,000 overall premium. This also qualifies you for the Mid-Year Class Reunion and your continuation in the program.

Note: If at anytime a PaceSetter no longer continues to follow the PaceSetter System and goals, they are subject to withdrawal.

Mid-Year Class Reunion – September 23-24, 2013

- Attendance mandatory
- Dynamics of Selling refresher
- Super Producer Round Robin

Quarterly Audio Conference Calls

- Both PaceSetter and sponsor required to participate
- Automatically scheduled through Salesforce

Miscellaneous Agreements

- Give State Auto "first look" at all eligible business
- The PaceSetter and agency will "Walk away" from all accounts the PaceSetter prospects which are already written with State Auto: 1. regardless of the source of the lead; 2. regardless of when the lead was secured; 3. no other agent within agency can work/place this account.
- Not participate in any other company training program or marketing effort
- Not participate in any other sales or incentive program
- Not be off the job more than five individual business days over the PaceSetter year for meetings, CE classes, golf outings, young agent's conferences, etc.
- No minimum account size
- Use of monoline workers comp. markets
- A PaceSetter's compensation is not to be reduced during their PaceSetter year.

Sales Incentives (refer to fee refund and cruise incentive rules for full details)

- Quarterly Incentives
- Fee Refund - SA qualifying premium
 - o \$100,000 - 100% fee refund
 - o \$ 75,000 - 75% fee refund
 - o \$ 50,000 - 50% fee refund
- Cruise Incentive - SA qualifying premium
 - o \$300,000 and up - plus luxury suite and \$200 PaceSetter cruise money
 - o \$250,000 – plus one day extension
 - o \$200,000 – plus up-graded cabin
 - o \$150,000 – plus shore excursion for PaceSetter & guest
 - o \$100,000 - PaceSetter & guest
 - o \$75,000 - PaceSetter (\$300 buy-in for guest)
 - o \$50,000 - PaceSetter (\$600 buy-in for guest)

Communication with PaceSetter Team

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

If there is any doubt on your part of your willingness to commit to the above provisions, please let us know no later than Wednesday, December 5, 3:00 p.m. (EST), and we will withdraw you from the class without penalty.