

# AGENCY MANAGER BASICS



## AS A MANAGER - BE A MANAGER

Be a reflection of the Equis Core Values: Respect, Ownership, Relationships, Toughness, Attitude, and Humility.



## UNDERSTAND CORPORATE LICENSING

The Equis Operations Team is here to help you. For example, don't assume you need to hold an incorporated license.



## TRANSFER & RELEASE PROCEDURES

Rely on your manager or the home office for these procedures.



## BE KNOWLEDGEABLE OF STATE REGULATIONS

*Non-Resident License Requirements, Pre-Appointment States, CE Requirements.* As a licensed agent you are expected to know these things.



## ADHERE TO COMPLIANCE REGULATIONS

Not only you, but also your agency, as well as Equis. This applies not only to State DOI Regulations, but FTC Regulations as well.

## EARN YOUR OVERRIDE

Reach out to help your agents. Manage and lead from the front!

## PROMOTE ALL TRAININGS

Company-wide in-person trainings, online trainings, conference calls. Let Equis do the heavy lifting for you!

## POSITIVITY

Create a culture of positivity. This is crucial. Otherwise, consider not becoming a manager here at Equis.

## KNOW YOUR NUMBERS

Keep track of submitted, pending, and issued paid business; are you close to your next promotion? Our technology makes this seamless!

## USE YOUR RESOURCES

Use tools and reports available from carriers to get a picture of your business. Develop your own relationships with the carriers.

## MANAGE CARRIER DEBT

Don't let roll-ups catch you or your downline by surprise. Again, with our technology, everything is right on your dashboard in red.

## BE AWARE

Be aware of trends in your agency and your agents. This is a very predictable business, and we provide you with KPI's and reports of everything you should be watching in order to be a **proactive manager**.

## HELP & ENCOURAGE

Help agents to understand the value of a lead investment. Operating without leads is like opening a store with no inventory. Encourage the use of all types of leads. Would you rather fish in a lake or barrel?

## FOLLOW-UP

Promote follow-ups with clients and secondary sales in your agency. Build a Book of Business, reach out for annual client reviews...become a one-stop shop for your clients!