

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!