

INSURANCE GROWTH ACADEMY

TRAIN SMARTER. LEAD STRONGER. GROW FASTER.

A 12-week program for producers and agency leaders

Producer Track Session Descriptions

Session 1: Introduction to Sales DNA - *Stop Closing, Start Helping!*

The world of selling has evolved. Today's buyers have unprecedented access to information and are ten times savvier than they used to be. Yesterday's antiquated, manipulative sales tactics are no longer effective. Consumers demand a new, more ethical approach to being sold. In today's environment, selling conscientiously is essential for insurance professionals aiming to thrive in this ever-changing marketplace.

Success in sales today is not about using magic scripts, the "always be closing" mentality, or using outdated sales methodologies that predate the moon landing. It's about understanding your psychology, overcoming self-limiting beliefs, and selling with integrity. If you don't take the time to discover and address the hindrances living in your Sales DNA—your thoughts, beliefs, behaviors, and competencies—how can you expect to perform at your highest level and reach your full potential in sales?

You'll learn how to:

- How to avoid the slimy "Used-Car Salesman" stereotype and sell with authenticity.
- How to "close" without being pushy, rude, or obnoxious.
- How to identify and overcome self-limiting beliefs hindering your sales potential.
- Why your Sales DNA is the most crucial factor in your success as a producer.

Session 2: Mindset Over Mayhem - *Mastering Habits, Focus, and Time Like a Top Producer*

In today's chaotic and noisy world, distractions are constant and burnout is real. The difference between average producers and world-class producers doesn't lie in raw talent—it lies in their mindset, discipline, and ability to control their day before the day controls them. This session helps insurance professionals cut through the noise and chaos by building an elite-level mindset, developing high-performance habits, and managing time like an asset, not an obstacle.

You'll learn what the best producers do to stay consistent, focused, and intentional, day after day, month after month. Success isn't about doing more. It's about doing what matters—better, deeper, and more consistently. If you don't gain control of your mind, your time, and your habits, the mayhem will always win.

You'll learn how to:

- Why mindset is the foundation of every high-performing insurance producer.
- How owning your time vs. managing your time produces much better results.
- Why training for 15 minutes per day is the key to your success.
- What brushing your teeth and consistent performance have in common.

Session 3: Playbooks Win Championships - *Build Your Process, Win More*

Top producers don't leave their success up to chance—they follow a proven game plan. Just like athletes rely on playbooks to execute under pressure, elite insurance professionals use sales processes to win consistently, regardless of the situation. If you're still winging it, hoping your personality and charm will carry you across the finish line, you're leaving income, opportunity, and control on the table. In this session, we break down why a clear, stage-driven sales process is your competitive edge in a noisy, skeptical marketplace. With over 80% of producers lacking a documented, updated, and relevant sales process, simply having one immediately puts you ahead of the pack.

A well-built process isn't about rigidity, it's about clarity, flow, and empowerment. It helps you guide, not push. It empowers both you *and* your buyer. Whether you're selling to a cold lead or nurturing a long-time client, your process should eliminate uncertainty, boost confidence, and dramatically increase your ability to forecast, present, and close with purpose. This session will show you how to build, personalize, and execute a process that works for *you*, not a one-size-fits-all script that strips away your authenticity.

You'll learn how to:

- Why following a sales process increases success, reduces stress, and drives referrals.
- How to build a stage-driven sales process that fits your style and market.
- How to gain genuine control of the sales conversation—without being pushy or robotic.
- Why process-focused producers are happier, more respected, and more profitable.

Session 4: The Goal-Setting Fallacy and Why It May Be Hurting Your Productivity

For years, we've been told that goal setting is the key to success. But what if everything we've been taught about goals is wrong? In this bold workshop, we'll challenge the traditional view of goals and explore how they might be hindering your performance. We've all heard the mantras: "You need goals or you'll never get to your destination," or "You've got to write them down," and of course, the age-old acronym, "They gotta be S.M.A.R.T. goals." But what if you're setting yourself up for failure by clinging to these outdated beliefs?

Many of the beliefs we hold about success, including goal setting, are rooted in confirmation bias, and they keep us stuck in patterns that don't serve us. This session will break down the myths around goals, revealing why fewer than 10% of people ever achieve them. We'll explore how the pressure to meet arbitrary targets can lead to burnout, negative self-talk, and ultimately, disengagement. Instead, we'll focus on practical methods that are grounded in reality and backed by science—methods that help you stay motivated, positive, and productive without the unnecessary stress.

You'll learn how to:

- Break free from the destructive mindset that goals are the only path to success.
- Use actionable to-do lists to boost productivity and confidence.
- Shift from goal-centric to activity-focused thinking to unlock your full potential.
- Focus on DPIs rather than KPIs and how it will change the way you think about success.

Session 5: The Connection Effect: *Prospecting + Networking = Success!*

Sales success still begins with one simple but powerful idea: connection. In this session, we confront the outdated, high-volume cold-calling mindset and replace it with modern, strategic prospecting. You'll learn how to build a daily prospecting rhythm that actually works, use tools like "The Daily 100" to stay consistent, and tailor your outreach to be more human and less robotic.

We'll also tackle "telephobia"—that all-too-common fear of picking up the phone—and offer practical strategies to break through it without burnout or gimmicks. From there, we'll shift into the power of real networking—not transactional schmoozing, but authentic, value-first relationship building that drives opportunity. If you've ever felt stuck between old-school tactics and today's noisy marketplace, this session is your breakthrough.

You'll learn how to:

- Create a consistent daily prospecting rhythm with purpose and precision.
- Overcome phone anxiety and use the phone effectively without burnout.
- Replace generic outreach with high-impact, personalized messaging that gets results.
- Master the art of authentic networking that builds real relationships, not just contacts.

Session 6: Renewals & Referrals: *Transforming Customer Loyalty into Your #1 Growth Strategy*

Referrals and client retention are two of the most powerful tools in sales, yet many salespeople fail to leverage them effectively. In this session, we'll show you how to turn your satisfied clients into your best sales team by mastering the art of asking for referrals at the right time and in the right way. You'll also learn how to keep your existing clients happy and engaged, ensuring they stick around and send more business your way.

We'll dive into actionable strategies for building long-term relationships, creating systems to track your referrals and retention efforts, and using authentic communication to make your clients feel valued. Whether you're struggling to get referrals or seeking to enhance client loyalty, this session will give you the tools to create a sustainable growth engine through referrals and retention.

You'll learn how to:

- Master the lost art of referral generation that will transform your business.
- Build deeper, lasting relationships with clients to create a constant revenue stream.
- Maintain and nurture clients and better execute life *after* the sale.
- Implement the Relationship Maintenance Plan for stickier clients who'll stay forever.

Agency Owner/Manager Track

Session 1: Hope Isn't a Training Strategy - *Why Producers Fail and How to Prevent It*

In this session, we'll explore why new salespeople often fail and how you can prevent it. The key is starting with the right candidates—those with the right motivation, work ethic, and compatibility for the role. Using the Sales DNA Test, you can identify top performers before hiring them. Once you have the right people, the next step is to set them up for success with clear expectations, effective onboarding, and the right level of supervision. We'll dive into the importance of ramp-up time and leadership support during those critical first months.

We'll also address the psychological factors that contribute to failure, such as emotional instability or dishonesty, and how to spot these issues early on. Lastly, we'll emphasize the importance of preparing new salespeople with the knowledge they need to succeed, ensuring they know the answers to key questions about your product, process, and goals from day one.

You'll learn how to:

- Use the Sales DNA Test to hire candidates with the highest potential for success.

- Set clear expectations and provide consistent leadership during the ramp-up period.
- Identify and address psychological red flags before they become major issues.
- Equip new salespeople with the knowledge they need to succeed.

Session 2: If You Build It, They Will Come - *Attract, Retain, and Inspire Through Process*

Imagine building an agency where top-tier producers flock to join, bringing with them profitable clients, quicker sales cycles, glowing testimonials, higher employee retention, and predictable revenue. This “Field of Dreams” concept is real, but it requires a strong foundation—a solid sales and recruiting process that’s built for your agency’s unique needs. Success isn’t just about having the right salespeople; it’s about creating an environment where your team is continually coached and developed to execute your specific processes effectively. Generic systems won’t cut it. Instead, you’ll need a customized approach to attract the best talent and keep your sales engine running at peak performance.

Building a high-performing sales team starts with leadership that is committed to teaching, training, and reinforcing a tailored sales strategy. It’s not enough to simply manage; you must actively coach your team through a process of constant practice, role-playing, and repetition. Only then can you turn your sales playbook into high-level performance.

You’ll learn how to:

- Attract elite producers by establishing a clear, culture-driven sales foundation.
- Build custom sales processes tailored to your agency’s unique needs.
- Implement a disciplined approach to practice, role-play, and repetition.
- Create a sales environment where talent thrives, fostering higher retention, better results, and continuous improvement.

Session 3: One-Size-Fits-NONE - *“Watch Me” Is NOT a Successful Training Strategy*

Traditional sales training often defaults to a “one-size-fits-all” approach, where every producer is treated the same, regardless of their unique strengths, learning styles, and needs. The “watch me and learn” method is outdated and ineffective, wasting valuable resources and failing to empower salespeople for long-term success. In this session, you’ll uncover a revolutionary training method that focuses on developing each producer according to their individual skills and needs, unlocking their potential and driving your agency’s growth. With a smarter approach, you’ll build a high-performing sales team that thrives on personalized, hands-on learning and ongoing coaching.

You’ll learn how to break free from outdated training methods and embrace strategies that focus on hands-on learning, individual strengths, and personalized development. By understanding the unique ways your team learns and responds, you can build a training program that empowers them to think, adapt, and sell in their own way. This session will provide the framework to transform your sales training and development efforts into a high-impact system that produces results.

You’ll learn how to:

- Break free from the ineffective and old-school “watch me and learn” training methods.
- Apply personalized, hands-on coaching and development tailored to each producer.
- Speak the three “love languages” of salespeople to motivate and inspire your team.
- Leverage Sales DNA to create custom training plans that maximize each producer’s strengths and growth potential.

Session 4: Recruiting Top Producers - *Using Analytics and Poker Skills to Your Advantage*

Have you ever hired a producer you were convinced would be a superstar, only to find out after a week that they weren't who they said they were? If so, you're not alone. 30% of new agents leave within their first 90 days, and 90% quit within the first year! The cost of a bad hire is significant, costing the average agency \$75,000 for each one! Worse yet, the odds are stacked against you: it takes hiring 100 producers to expect just ONE who stays longer than five years and performs in the top 20%. That's a huge risk for your agency's bottom line.

But what if there was a better way? We can learn from the world's best poker players, who read their opponents with precision. Imagine if you could apply the same skills to assess candidates during the interview process. By mastering these techniques, you can dramatically improve your hiring process, reduce turnover, and increase the chances of hiring top producers who stick around and perform at their best. It's time to change the odds and set your agency up for long-term success.

You'll learn how to:

- Identify key traits that predict long-term, successful producers.
- How to triple your success rate during your hiring process with the Sales DNA Test.
- Apply the same psychological techniques used by top poker players to assess and read candidates during interviews.
- Streamline your hiring process to reduce turnover and minimize the cost of bad hires, ultimately improving your agency's bottom line.

Session 5: Mastering Sales Meetings - *Leading Effective One-on-Ones and Team Meetings*

Sales meetings are a critical part of any sales organization, yet they are often seen as a necessary evil rather than an opportunity for growth and improvement. Without proper planning, sales meetings can become unproductive, leading to frustration and disengagement among team members. In this workshop, you'll learn how to plan and execute effective sales meetings that motivate your team, drive results, and improve overall sales performance. When done right, meetings can foster collaboration, uncover new insights, and keep your team aligned and motivated.

In addition to mastering group sales meetings, this workshop will focus on the importance of one-on-one personal meetings with your producers. These individual sessions offer a unique opportunity to connect, provide personalized coaching, and address specific challenges or goals. Learn how to conduct meaningful one-on-ones that empower your team members, increase accountability, and foster a sense of ownership over their performance. With a mix of personal attention and a clear structure, these one-on-one meetings will become an essential tool for developing and retaining top talent in your sales organization.

You'll learn how to:

- Design and lead sales meetings that are structured, engaging, and inspiring.
- Create a standardized meeting agenda that keeps your team aligned and accountable.
- Conduct impactful one-on-one meetings that drive individual growth and performance.
- Ask powerful coaching questions and set actionable targets tailored to each producer.

Session 6: Accountability for Leaders - *How to Drive Results Without Micro-Managing*

Accountability isn't about punishment—it's about ownership, growth, and results. In this session, you'll learn how to establish a culture of accountability without hovering or micro-managing. Salespeople don't become more responsible by chance; they need structure, consistency, and a leader who models the behavior they expect. We'll show you how to eliminate excuse-making, increase performance, and build a team that takes full ownership of their numbers. From implementing daily huddles and group metrics to having firm, expectation-driven one-on-one conversations, this session will give you the tools to drive results and create lasting change on your producer team.

Leaders often struggle to find the right balance between being supportive and holding people to a standard. We'll teach you how to raise the bar without breaking trust, and how to make accountability something your team embraces rather than fears. You'll walk away with practical strategies for being firm, not forceful, and inspiring, not intimidating. The most successful leaders don't lower expectations to meet performance; they raise performance to meet expectations. This session will help you step into that kind of leadership and finally create a team that owns its success.

You'll learn how to:

- Implement team-based accountability rhythms like daily huddles and metric reporting that keep everyone aligned.
- Structure sales meetings that spotlight wins, challenge complacency, and eliminate excuses.
- Run one-on-one conversations that set clear expectations and inspire personal responsibility.
- Hold your team accountable consistently—without becoming a micro-manager or burnout-prone boss.