

AGENT /PLUMBER MARKETING METRICS

Note: This metric is based on a full-time Salesperson investing 40 -50 hours each week. If other duties and responsibilities are assigned, the metric suggested below may need to be modified.

“Route” Marketing – BASED ON 5 DAY WEEK

Insurance agents*	40*	(revise to only the <u>A</u> list after about 3 or 4 visits)
		<i>*less in small markets / more in large markets</i>
		<i>*(will be approx. 20 – 25 agents/brokers)</i>
Plumbers	25	revise this to a smaller “A” list after several visits
HVAC	10	revise this to a smaller “A” list after several visits
Adjusters	1	identify each adjuster and market to all of them monthly
Property Managers (residential)	1	identify each and market to all of them monthly

THIS IS AN AVERAGE OF ONLY 15 VISITS PER DAY. PHONE CALLS AND EMAILS DON'T COUNT.

When marketing to insurance agents...

- Identify “A’s, B’s, C’s for all Route Mktg Prospects
- Only call on the “A’s” monthly (B’s & C’s can be visited every 3 – 6 months, or email monthly)

“A” Agents (those that have referred work to you in the past 18 – 24 months) (A = Awesome)

“B” Agents (those that have not referred work to you in the past 18 – 24 months but you strongly believe they can be cultivated into a good referral source) B = Budding

“C” Agents (those that have refused to meet with you, never sent you a loss, state they don’t deal with claims, etc) “C” = Crap

NOTE: “A” AGENTS ARE RECEPTIVE TO MORE INVOLVEMENT AND ACTIVITY FROM YOU

YOU SHOULD DETERMINE THE SPECIFIC NUMBERS BASED ON YOUR SPECIFIC MARKET! EVERY TERRITORY AND REGION IS SLIGHTLY DIFFERENT.