THE ART AGENCY

AGENCY ZOOM TRAINING · COMPANION TO THE NEW HIRE GUIDE

Agency Zoom Leads Training

One lead, from first call to sold — and beyond

Follow Marcus Bennett through every screen, button, and automation

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Meet the deal

The New Hire Guide explains each part of Agency Zoom on its own. This companion does the opposite: it follows one prospect through the whole system in order, so you can see how the pieces connect on a real deal. Section references (e.g. Guide §5) point back to the main guide if you want the detail behind a step.

> **Our prospect**
>
> **Marcus Bennett** calls the office on a Tuesday. He found us on Google and saw our reviews. He has auto and home with State Farm, his renewal just jumped, and he's shopping. He's a textbook personal-lines lead — the most common deal you'll work — so we'll follow him. Commercial runs the same shape with a few extra stages, noted at the end.

We'll take Marcus all the way to a sold policy, then show the alternate ending: what happens in the system if he doesn't buy right away. Both paths matter — the second one is where a lot of our business actually comes from.

Step 1 — The lead comes in

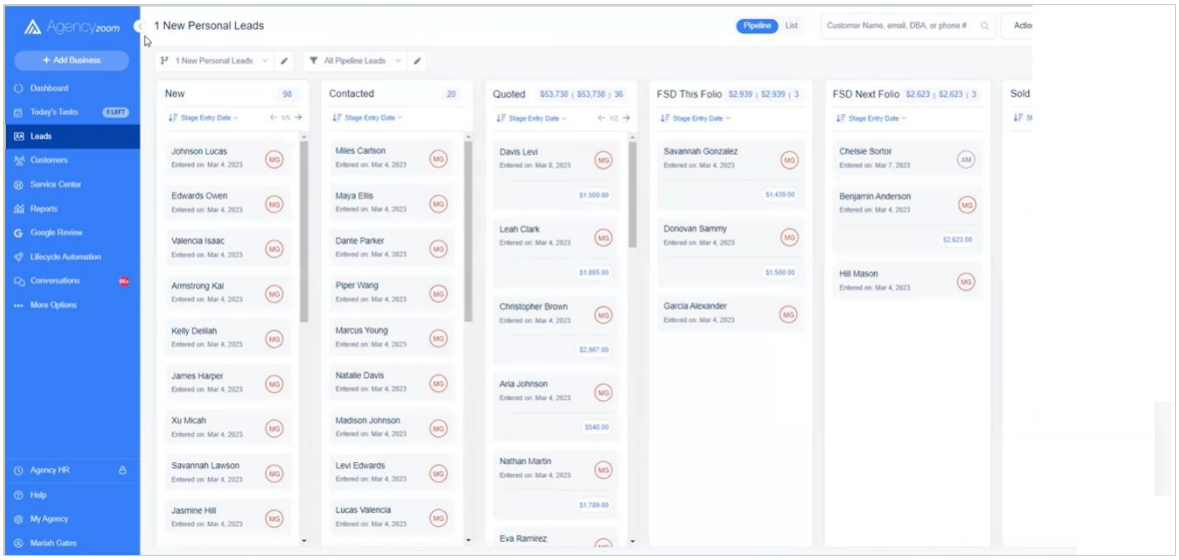
Marcus calls. Before anything else, he becomes a record in the system — a lead is never just a sticky note.

In Agency Zoom: Create Marcus as a new lead in the New Personal Leads pipeline. He lands in the New stage. Set his lead source to "Google" — this is how we later prove which marketing actually converts (Guide §12).

Automatically: If intro automation is built for the Google source, the first touches are queued. You can see exactly what's scheduled on his lead page and toggle it on or off (Guide §5).

Why it matters: Every lead that touches the agency gets captured here. That's what makes recycling possible months or years later. A lead you don't enter is a lead you can never re-work.

> **Ask the magic question**
>
> When Marcus says "I found you on Google," that's the lead source. We close a high rate of Google callers because they came looking for good service. Always ask "how did you find us?" and record it.



The New Personal Leads pipeline — New, Contacted, Quoted, FSD This/Next Folio, Sold.

Step 2 — First contact

Automation can email and text, but it doesn't close deals — you do. Call him back fast while he's engaged.

In Agency Zoom: Log the call on Marcus's lead page. Once you've connected and you're actively working him up, drag him from New to Contacted. Add a note on what he's looking for.

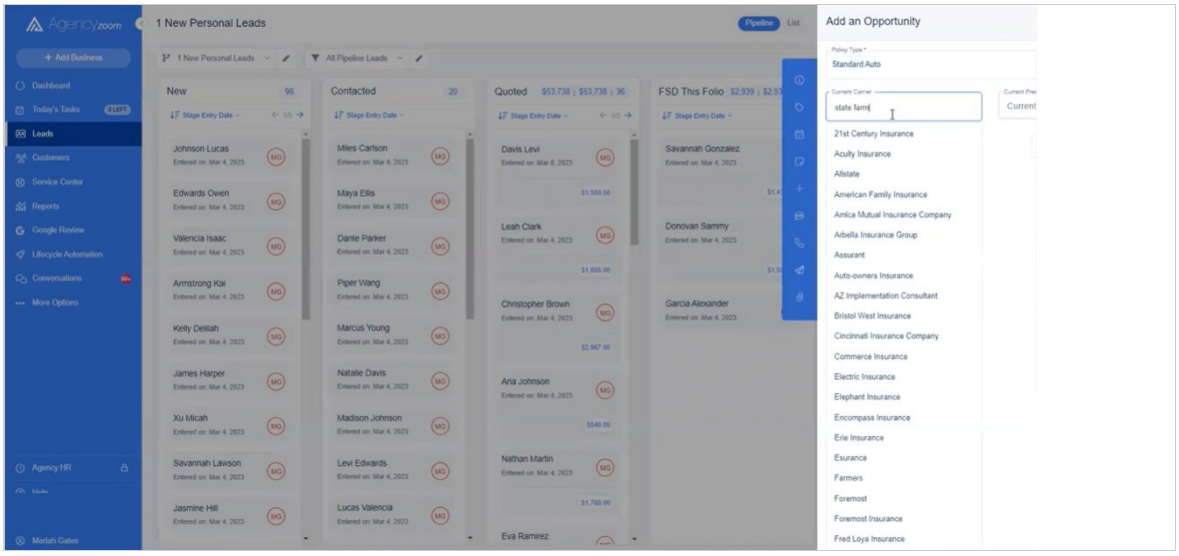
Why it matters: Moving the stage isn't busywork — it's what feeds the conversion reports. If we're losing deals between New and Contacted, that report tells us we have a speed-to-lead problem, not a quoting problem (Guide §12).

Step 3 — Discovery — document what he has now

This is the highest-value 60 seconds of the whole call, and the step new hires skip most often.

In Agency Zoom: Under Opportunities on Marcus's lead, record his current carrier (State Farm) and his premium. If he can send his dec pages, attach them here.

Why it matters: The Opportunities field is searchable across the whole book. The day our pricing beats State Farm, we pull every unsold lead carrying State Farm — Marcus included — and call them back: "We're competitive with them now." Skip this step and Marcus becomes invisible to that search forever (Guide §6).



Recording the current carrier (State Farm) under Opportunities.

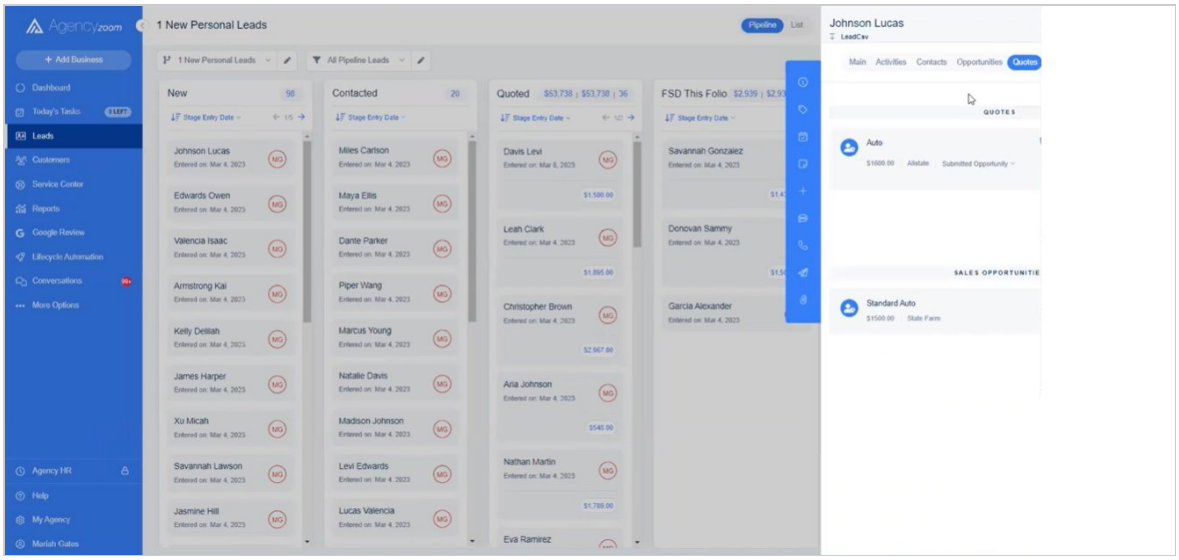
Step 4 — Quote it

Now we build the actual numbers.

In Agency Zoom: Use the PL Rater link on his lead so you're not double-entering data. When the quote is ready, document what you quoted — carrier, line, premium — and attach the quote PDF. Then drag Marcus to Quoted.

Automatically: Moving him to Quoted starts the follow-up sequence — e.g. touches beginning the next day — so he keeps hearing from us even between your calls.

Why it matters: Attaching the quote and recording the premium isn't for today — it's for the recycle. If Marcus doesn't buy now, a teammate re-working him in eight months can see exactly what we offered without starting from zero (Guide §6, §7).



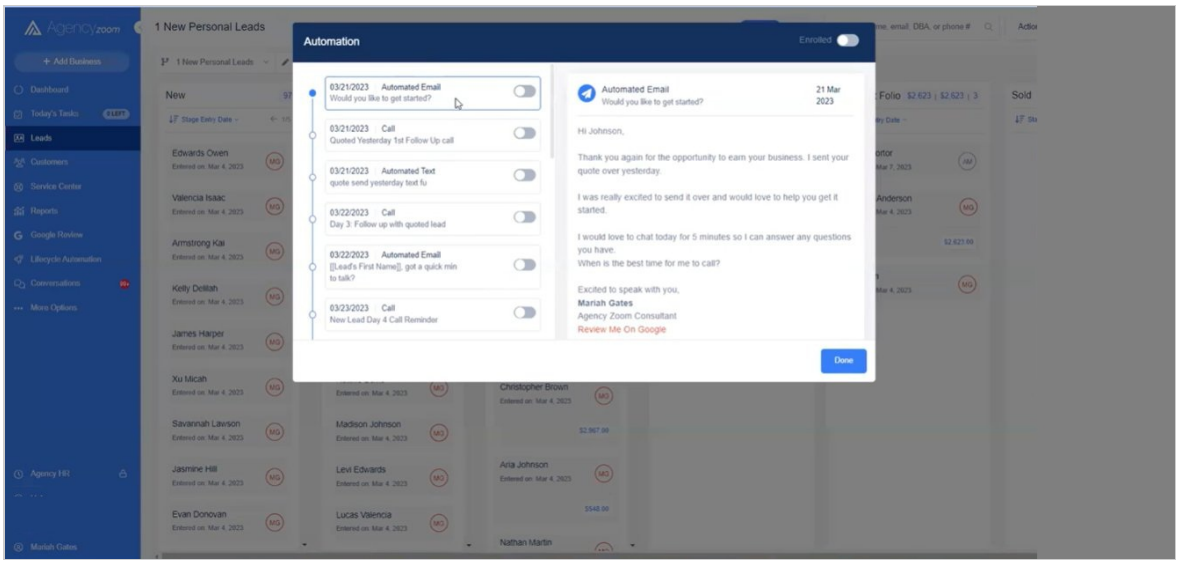
The quote ($1,600 Allstate) and current-carrier opportunity on the lead.

Step 5 — Follow up

Marcus is in Quoted. Some prospects say yes on the spot; most need a nudge.

In Agency Zoom: Keep calling, and let the automation carry the routine touches. Use templates to text or email him quickly — you don't write these from scratch.

The shot clock: If Marcus stalls and sits untouched too long (our stages auto-recycle after a set window), the system won't let him rot in Quoted — it moves him into a recycle path on its own (Guide §7).



The follow-up automation sequence queued on the lead.

From here the deal forks. We'll take the happy path first.

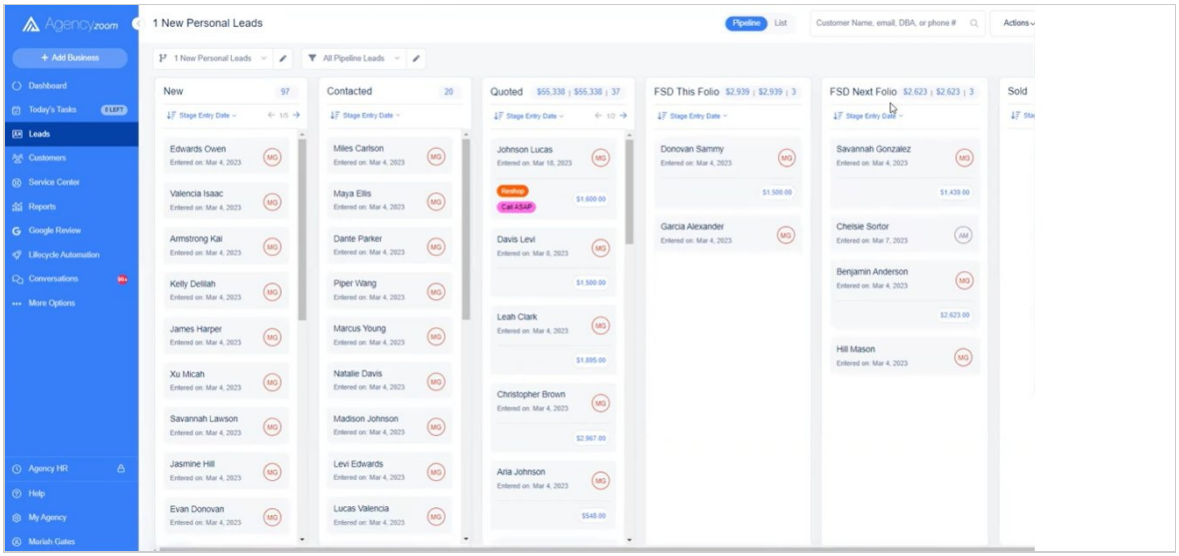
The close

Step 6 — He commits — but wants a future start date

Marcus says yes. But he gets paid on the 18th and asks us to start the policy then, not today. He's committed — he just isn't submitted yet. This is exactly what the Future Submit bucket is for.

In Agency Zoom: Collect his payment info. Move Marcus from Quoted into the Future Submit (FSD) bucket for this month. Set a reminder task — and a calendar entry — to submit on the 18th so it's never missed.

Why it matters: The FSD bucket separates "committed, will land this month" from "still undecided." At a glance the team can see real sold numbers, what's effectively in the bag for month-end, and what's genuinely still open (Guide §7). Don't mark him Sold yet — he isn't submitted.



The Future Submit / Future Sold (FSD) buckets between Quoted and Sold.

Step 7 — Submit — and he's sold

In Agency Zoom: On the 18th, your reminder fires. You submit to the carrier and move Marcus to Sold. The dashboard updates in real time — your goal circle moves the moment he lands (Guide §3).

The instant he's sold, the system goes to work

Becomes a customer: Marcus now appears on the Customer page with his policies, premium, assigned producer, and CSR (Guide §8).

Onboarding starts: He enters onboarding automation through his first renewal — welcome, education, and cross-sell. Because he bought home, he gets the mortgage-protection life email a few days in (Guide §11).

Review request: The system requests a Google review. After your great call, text him the review link too — reviews are how the next Marcus finds us (Guide §10).

Step 8 — He's a customer now — the deal keeps paying

The sale isn't the end of the record; it's the start of the relationship.

- Marcus came in with auto + home but no umbrella. From his customer record, use Actions to create an umbrella lead, drop it in the pipeline, and the cross-sell cycle begins (Guide §8).
- At renewal, he flows into our Service Center renewal process — and if he picks up that umbrella, three policies makes him a VIP-tier client (Guide §9).
- Every note, text, and call stays on his record, time-stamped and undeletable — our protection if a question ever comes up (Guide §8, §13).

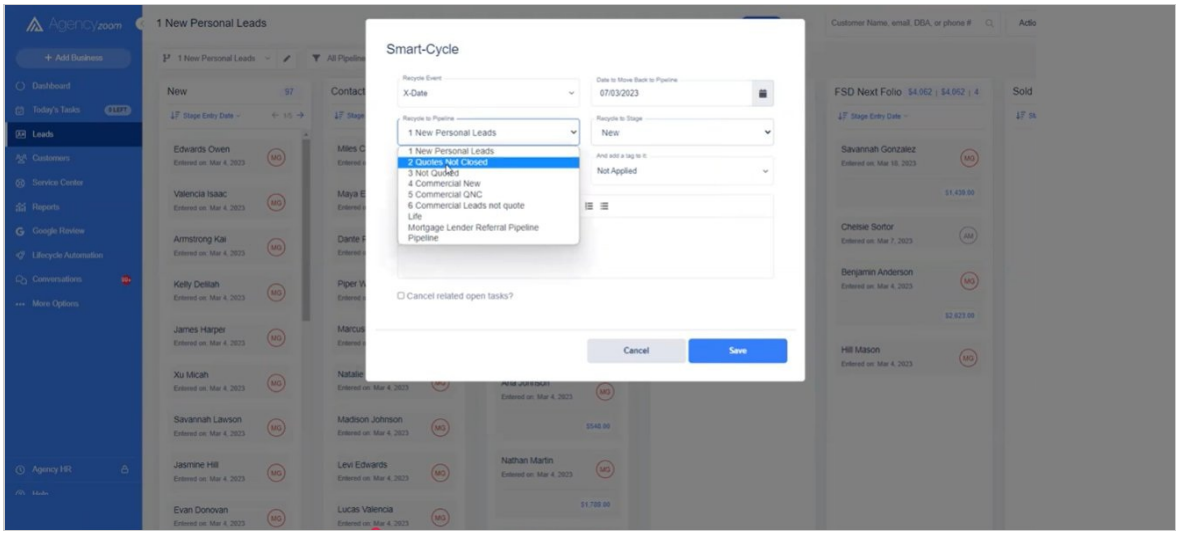
Alternate ending: he doesn't buy

Rewind to Step 5. This time Marcus says: "Appreciate it, but you couldn't beat my price." In most agencies, that's where the lead dies. In ours, it's where the recycle begins — and the transcript is blunt that this is where a lot of our business comes from (closing roughly 6.5% of leads we quoted three years ago).

Step 6b — Capture the X-date and Smart Cycle him

In Agency Zoom: Get Marcus's renewal (X) date — say August 2nd. Move him into Smart Cycle and schedule his return for early July, into the Quotes Not Closed pipeline, with a note on why he didn't buy. He disappears from your active view.

Why it matters: Timing is everything. Reaching out August 2nd is too late; early July is right before he shops. Smart Cycle gets him off your plate now and hands him back exactly when he's worth a call again (Guide §7).



Smart Cycle — recycling on the X-date into Quotes Not Closed.

Step 7b — He comes back automatically

In Agency Zoom: In early July, Marcus reappears under Quotes Not Closed on his own. Fresh automation — emails and texts — starts, and the team gets call reminders. You do nothing to make this happen; you just work him when he surfaces.

The payoff: Maybe our rates moved, maybe State Farm raised him again. This time he buys — and rejoins the happy path at Step 6. That's a sale from a lead you "lost" months ago, at no new marketing cost.

> **The one rule on the alternate ending**
> Recycle through Smart Cycle — don't manually drag leads between pipelines as a habit, since that distorts reporting. The only time Marcus goes to Dead is if he says "take me off your list" (Guide §7, §13).

The deal at a glance

The whole journey, start to finish:

Stage / action	What you do	What the system does
New	Create lead, set source = Google	Queues intro automation
Contacted	Call, log it, move stage	Feeds conversion reports
Discovery	Record current carrier + premium (Opportunities)	Makes him searchable for remarketing
Quoted	Quote in PL Rater, attach PDF, move stage	Starts follow-up sequence; shot clock guards staleness
Future Submit	Commit + collect payment, set submit reminder	Forecasts month-end sold
Sold	Submit to carrier, move stage	Dashboard updates; onboarding + review request fire
Customer	Cross-sell umbrella via Actions	Renewal + service automation takes over
(If lost) Smart Cycle	Capture X-date, schedule return	Auto-recycles him before his renewal

If Marcus were a commercial deal

Same story, more stages. Commercial runs New → Contacted → Application → Underwriting → Present → Quoted → Bind → Sold. The extra steps reflect the real process: while he's in Underwriting, automation emails him every few days that we're working with the underwriters; when we move him to Present, he gets an email and text that his quote is approved and ready to discuss. Everything else — documenting Opportunities, recycling on the X-date, the protective rules — works exactly the same (Guide §5).

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