Truck Best Practices :: Overview

Version 8.0 :: Lightning :: May 22, 2023

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Best Practices :: Module 1

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Module 1: Overview & Setup

Welcome to the Team

- Welcome to WeShop™ Insurance Group. We are an innovative team of hard working leaders who are transforming the insurance industry. As a member of our Transportation Division, you are part of our fastest growing division, and we value your talent and feedback. Our doors are always open to new ideas and improvements. We are excited to have you here!
- This Best Practices guide is intended to help get you up to speed as fast as possible. It is a work in progress and will be updated as we find better ways to improve our training and resource systems. It is a quick read, and can be referenced at any time.
- Note that this document, all systems, videos, training, processes etc are the property of WeShop™ Insurance Group. Do not share them with anyone.
- Let's get started!!!!

Home Office Setup

Principles

- **Work from Home**
    - We believe that working from home can be the ideal situation for many people. Since we began in 2016, we've designed our business to provide a comfortable and efficient way for sales reps to work from home and have a healthy work/life balance. This includes a powerful lead engine system to hand deliver hot leads to every rep, as well as fine tuned software and systems to make communications easier all around. The system has proven to allow reps to focus almost entirely on sales, and not corporate meetings, paperwork, cold calling or driving to and from work.

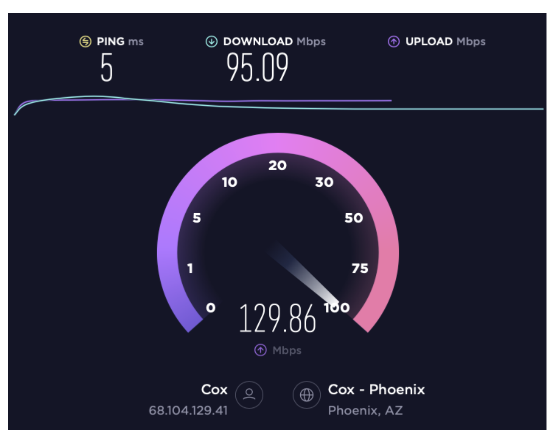
- **Aligned in Common Purpose**
    - We all win together. If you sell more, we all share in that success and you have no income cap. The operations team is dedicated to helping you be as efficient as possible. We are all aligned.
- **The Right Tools For the Job**
    - WeShop™ provides your desk phone and all software systems. In order to properly leverage this “work at home” business model, it’s important that each rep has the proper computer systems and internet connection. The next section outlines some best practices for your home office technology.

Computers

- **Desktop and Two Monitors**
    - The best practice setup is a desktop computer and two monitors side by side. This extra surface area allows reps to view email, Saleforce and web browser at the same time.
- **Laptop and One Monitor**
    - If you plan to work from multiple locations, you may choose to work with a laptop and one monitor. Although the screen area is less than with a desktop computer and two monitors, this setup allows for easy travel.

Internet: Ethernet vs. WIFI

- **Ethernet is Faster than WIFI**
    - As a rule Ethernet (a physical wire connected to your computer) is faster and more reliable than WIFI. Since your desk phone needs to be “wired” to your router, it's usually best to “wire” an ethernet cable from your router to your computer as well.
- **Test Your Internet Speed**
    - You can test your internet speed at www.Speedtest.net. This test will give you two results: Download speed and Upload speed. Typically download is faster than upload, but best practice scores (both) should be over 20 MBS.
        - Excellent:100 to 300+ MBS
        - Good: 20 to 100 MBS
        - Fair: 10 to 20 MBS
        - Need to upgrade: < 10 MBS



Phone System

User Manual

- We provide all our reps with a Yealink Phone and Headset - User Manual PDF

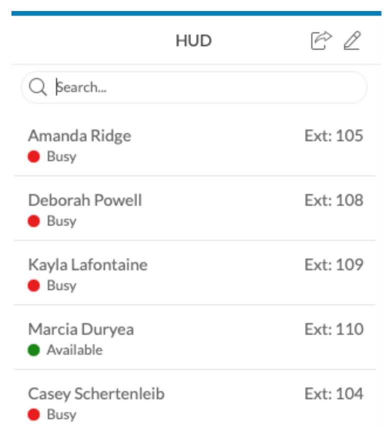
Headset

- A headset for sales reps is a must. It allows you to use both hands to enter data and take notes. “Wired” headsets are normally what is used, but if you would like to invest in a wireless bluetooth headset, that is up to you.

Call Blast vs. Direct Line

- About 25% of your leads on average will be inbound phone calls or voicemails. The remaining 75% will be web forms. When your phone display says TRUCK LEAD, that is a hot lead calling for Transportation Insurance. That call is ringing the phone of all Truck reps. Any other caller ID on your phone display means that the caller has called your direct line.
- NOTE: The lead engine is usually running 24/7, so TRUCK LEAD call blasts can happen anytime day or night. If you want to answer a TRUCK LEAD after hours, that is up to you. If you don’t want your phone to ring after you are done working, set your phone to DND (Do Not Disturb).

RingCentral “Phone” Application (HUD)



- Our phone system leverages RingCentral software. The RingCentral “application” is a small piece of software that you install on your computer. When opened, it allows you to see which WeShop reps on the phone and which lines are available. This is handy when you need to transfer a call to another rep.
- Download RC Phone App for PC
- Download RC Phone App for MAC

SMS (Texts)

- You can text your customers and it will be logged in Salesforce. (more in Module 4)
- You can **receive** text messages with photos
  - Have your client send texts/pics to your work phone number
    - Drivers Licenses
    - VIN Numbers
    - Note: Larger documents should be emailed to you.
  - Inbound SMS’s from clients are logged in every lead. You can also receive email notifications of inbound SMS, just ask Mike to enable it.

Rep Shifts and Schedules

- Work with Mike to determine your schedule.
- Once you are trained and comfortable with our CRM, Aim for 20-25 leads per week.

Transfering Calls

- From time to time you will answer a call from a lead or customer trying to reach one of our other WeShop Reps. Our phone system allows you to “warm transfer” the call directly to another rep or to a company Service Center.
- Watch “Transfer Call” Video 🎥

Call Recording

- All of our incoming calls are recorded and the caller is notified that “this call may be recorded for quality assurance”. The main purpose for this is to protect us all from any E&O claims. The recordings can also be used for training purposes.

Our Markets

States

- WeShop™ is licensed in 47 states. The only states we are NOT Licensed are: Massachusetts, New York and Hawaii.

Carriers

- Most Transportation clients end up with Progressive coverage. Occasionally, Berkshire Hathaway offers a good transportation solution. We work with these two companies, because they offer **direct bill, online rating and a Service Center** for our clients.

Valley Trucking Insurance

- WeShop™ has a partnership with Valley Trucking Insurance. Valley Trucking has a national footprint with local, regional and national truck insurance carriers.
- In an effort to provide more options to our clients that do not fit with Progressive or Berkshire Hathaway, **leads that are viable (Semis only) should be assigned to Valley Trucking Insurance**.
- When you need to send a lead to Valley Trucking Insurance, select the "Assign to Valley" button at the top of the Lead screen and the system will automatically pass the client info to them.
- Valley Assignment Steps:
    - Webform: Enter any internal notes and as much client information as possible.

- Manual: Enter New Lead into Salesforce including internal notes and as much information as possible.
- Click “Assign to Valley” at the top of Salesforce navigation.
- Click “Ok” when a confirmation pop-up appears.

Administration

How You Get Paid Monthly

- WeShop™ pays all reps between the 15th and 20th of each month (carrier report timing can vary) for sales closed during the prior month.
- Your Monthly Commission Payments include: 1) New Business Commissions 2) Positive Endorsements 3) Negative Endorsements - Prorated chargebacks from first year cancellations.
- Commissions on larger Berkshire Hathaway policies are paid in two installments.
- Commission is direct-deposited into each Reps bank account monthly.
- In order to earn commissions, **the signed application** and any other required documents must be uploaded to Salesforce.
- Liz (liz@weshop10.com) will review your commission with you personally each month, as well as provide an online report.

Vacation & Time Off

- As a 1099 Rep, there are no stated limits on vacation days or time off. Since your compensation is based on straight commission, your income is based on premium sold and not on hours worked. Please let Mike know of any planned vacations, personal time and/or days off with as much advance notice as possible. This will help us to adjust the lead flow for the time you will be away. We know that things can come up at the last minute so please communicate as best you can.

Taxes & Expenses

- All WeShop™ reps are 1099 and therefore should keep track of all business related expenses. These expenses often can be tax write offs that can reduce your tax liability. We suggest working with an accountant to maximize these deductions.
    - Home Office Deduction
    - Equipment Purchases
    - Mobile Phone Bills (if used for business)
    - License Fees
    - Etc
- Since reps receive 100% of their pay upfront, with no taxes held back, reps should work with an accountant to pay estimated state and federal quarterly taxes to avoid penalties.

- The WeShop™ owners use Whitman and Jackson for tax advice and submissions. Feel free to reach out to Matt O'Day if you would like to learn more about their services.
    - Tax Support: Matthew O'Day - matto@wjcpa.com - (623) 455-9630

Intro to Salesforce: Leads vs. Policies 🎥 5:58

Login

- Login to Salesforce (https://login.salesforce.com)
- Save as bookmark
- Salesforce has two different modes, Classic & Lightning. Your training will be done in "Lightning"mode due to the updated features.

Overview

- When a client submits a form, or calls into our 800 numbers, we create a "LEAD" in our Salesforce system. Think of "leads" as the Client or "parent" record in our database.
- POLICIES are the "children" of the Client or "Parent".
- When a new Lead is created, our system automatically generates a "blank" Policy. As you work on a quote for a particular Client (LEAD), you will be entering quoting information into the POLICY under that LEAD.
- Each LEAD (client) has the potential for multiple POLICIES (children).
- When you want Client info, work in the LEAD tab, when you are working on quotes, work in the POLICY tab.
- **HOMEWORK: Lead how to navigate from client (lead) to the policy, and back.**

Best Practices :: Module 2

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Module 2: Salesforce I

Salesforce Overview

- Our custom software system to manage all of your leads, clients, and policies will live in the “cloud” within our Saleforce.com (SF) system. We’ve been developing this amazing platform for years and continue to make improvements on an ongoing basis. You can access your SF account from any computer, anywhere from most browsers (Chrome seems to work best).
- Our custom version of SF is integrated with many important systems in order to keep all of your work within a single platform. Having multiple screens allows you to have at least 3 open windows to work: email, SF and a browser to research. Our SF system integrates with these other systems seamlessly:
  - **RingCentral** - This is our phone system.
    - You can Click to Dial within SF. With a single click, you can have the computer dial the phone number for you.
    - You can send Faxes directly to clients using email.
    - All RingCentral phone calls with a client are automatically logged for you in the client's record within SF.
  - **DocuSign** - You can send documents for signature from within SF. These interactions are also logged.

Leads vs. Policies - Part 2

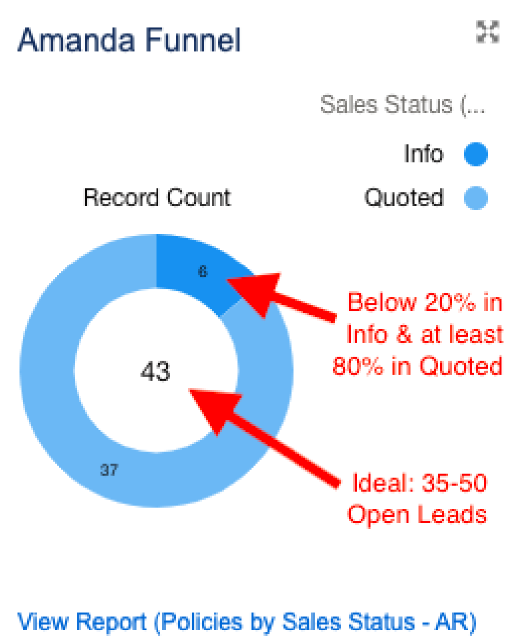
Overview

- When a client submits a form, or calls into our 800 numbers, we create a “LEAD” in our Salesforce system. Think of “leads” as the Client or “parent” record in our database.

- POLICIES are the “children” of the Client or “Parent”.
- When a new Lead is created, our system automatically generates a “blank” Policy. As you work on a quote for a particular Client (LEAD), you will be entering quoting information into the POLICY under that LEAD.
- Each LEAD (client) has the potential for multiple POLICIES (children).
- When you want Client info, work in the LEAD tab, when you are working on quotes, work in the POLICY tab.

Lead Flow

- ### The Platform
    - As you already know, our “Lead Engine” and supporting CRM (Customer Relationship Management) system is an industry leading integrated platform that incorporates more than a dozen software systems. It took more than 6 years to build, and is industry leading.
- ### Principle
    - There are plenty of leads on a monthly basis. Occasionally we have heavy or light days or even a week, but WeShop™ is committed to providing appropriate lead flow to all reps on a **monthly basis**.
- ### Pending Policies - Funnel
    - Most reps have never had this many leads to work. The tendency is to keep taking more leads, but as soon as your follow up process gets interrupted by more new leads, it’s time to consider focusing more on closing deals.
    - Historically, reps with more than 50 pending policies at any time begin to lose follow up momentum and can lose sales in the process. The best practice goal is to alway **keep your funnel below 35 - 50 (max) pending policies**. “Pending Policies” refers to any Policy that is not Won or Lost in the Sales Status “Buckets”. This includes New, Info and Quoted “Buckets”.



Lead Types

- **Phone Calls (Manual)**
  - There are no hotter leads than our live phone calls. Our highest closing rates have always been incoming calls. When you answer a phone lead you will enter the New Lead - Manually.
- **Web Forms**
  - WeShop™ lead engine normally runs 24/7. All leads are assigned automatically on a rotating basis to available reps. If you want to be “skipped” in the rotation, just let Mike know.
  - **Automated Email & SMS -** Within minutes of a lead submission, the system automatically texts and emails the client with the assigned reps contact info. Mike will run a test with you to demonstrate.

If You Can’t Write it

Always check for alternatives for a client if you cannot support them

- **WeShop™ Commercial Rep**
  - Rep and Extension: Casey 104
- **WeShop™ Personal Lines Rep**
  - Rep and Extension: Deborah 108
- **Valley Trucking Insurance**
  - Use the “Assign to Valley” button in Salesforce. See detail in Module 1.

Action Panel

- We have Quick Links to make it easier to access websites and forms that you will use on a daily basis.
- For Example: Click on SAFER and enter the clients DOT number for a snapshot of a company’s identification, size, commodity information, and safety record, including the safety rating (if any), a roadside out-of-service inspection summary, and crash information

Search Box 🎥 1:05

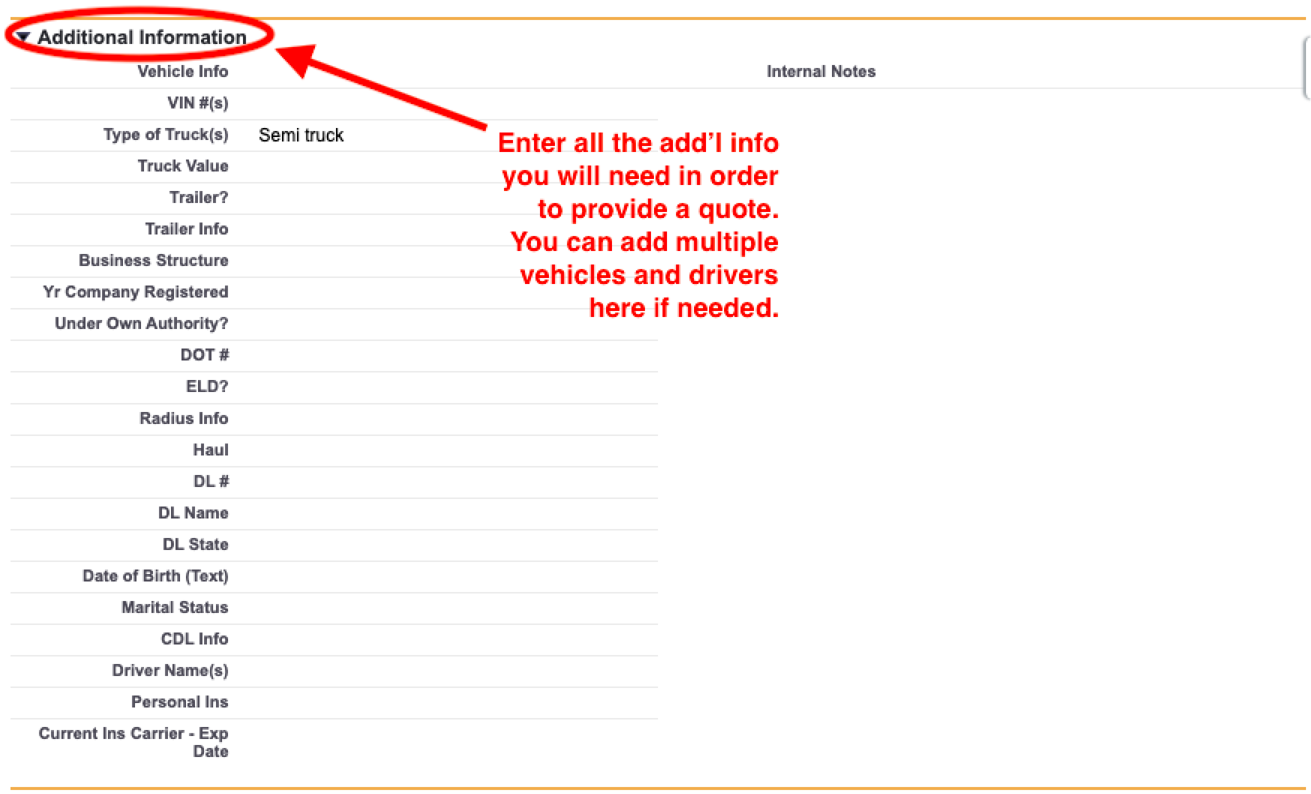
- When working with a client, always start with the appropriate **LEAD**. To find the correct client / lead, you can search using the search box at the top of Salesforce and enter: client name, company name, email, phone number, street number, policy number etc.

- Remember Clients are the LEAD, and the Policies (children) are listed in the Policy section towards the bottom of each lead.

Lead Data Entry 🎥 3:42

The “Lead” Tab

- The “lead” tab shows you a pull-down menu that includes: “Today’s Leads”, “Open Leads” and “Closed Leads”.



Example Internal Notes 🎥 0:51

- Best practices is to enter notes about your client in the **INTERNAL NOTES** field
  - **Top Down** - The most recent note should be at the TOP of the field.
  - **Date First** - Start every entry with the date (MM/DD/YYYY) followed by latest notes
  - **Be Detailed** - The more notes the better when you have 35-50 leads at a time.
  - **See Example** - Study the example below:

Internal Notes

Most recent note on top

6/17/2022 Wrote Progressive policy, explained coverages, emailed him application through docusign for signature

Policy 959044609 - $

$3,027.22 transferring from old policy to new policy
$692.86 is what is required down

6/16/2022 $1,022.57 down payment. Quote retained below. CHECK ON THE PROOF OF PRIOR. I will check on the filing on Monday since he's going to text me his information this evening for 1st thing in the morning.

6/16/2022 CA 104200088
$22,923 -

6/15/2022 Emailed proof of prior to Progressive from Apr - Oct 2021; Nov - May 2022. Sent him a sms explaining. I'll see if Progressive honors that.

Leave a space between dates

6/14/2022 Called Progressive, they have the AOR. It's in processing. She said it should be done within two days. Talked to Stephen, I should receive the dec page from Progressive on personal lines momentarily. He will call Nationwide for the Nov 21-May 21 dec page since he changed companies. The Progressive personal lines was faxed to me; waiting to receive that.

6/10/2022 The AOR was emailed and faxed to Progressive

6/10/2022 The rewrite is done but the AOR needs to get processed on the rewrite. Dee said probably by Thursday, I will check Tuesday. The rewrite was initiated by Steven or the other agent. The other agent does not know what she is doing, per Steven. Dee, Progressive put in notes the lack of knowledge the other agent has which should help with the process of the AOR on the rewrite, per Dee. Progressive notified the other agent but the agent never notified Steven and the DOT after 30 days is still not authorized due to name on policy, which is Sole Proprietor and needs to be LLC to coincide with DOT.

Current policy 5/10/2022 - 5/10/2023

6/10/2022 Dee, Progressive. The AOR is being processed

6/10/2022 Called, left vm, sent sms & email

Related Leads 🎥 **2:01**

- As you open new leads, keep an eye for "Related Leads". These are leads that have the same phone # or email address - who may already be working with another rep.

▼ **Related Leads**

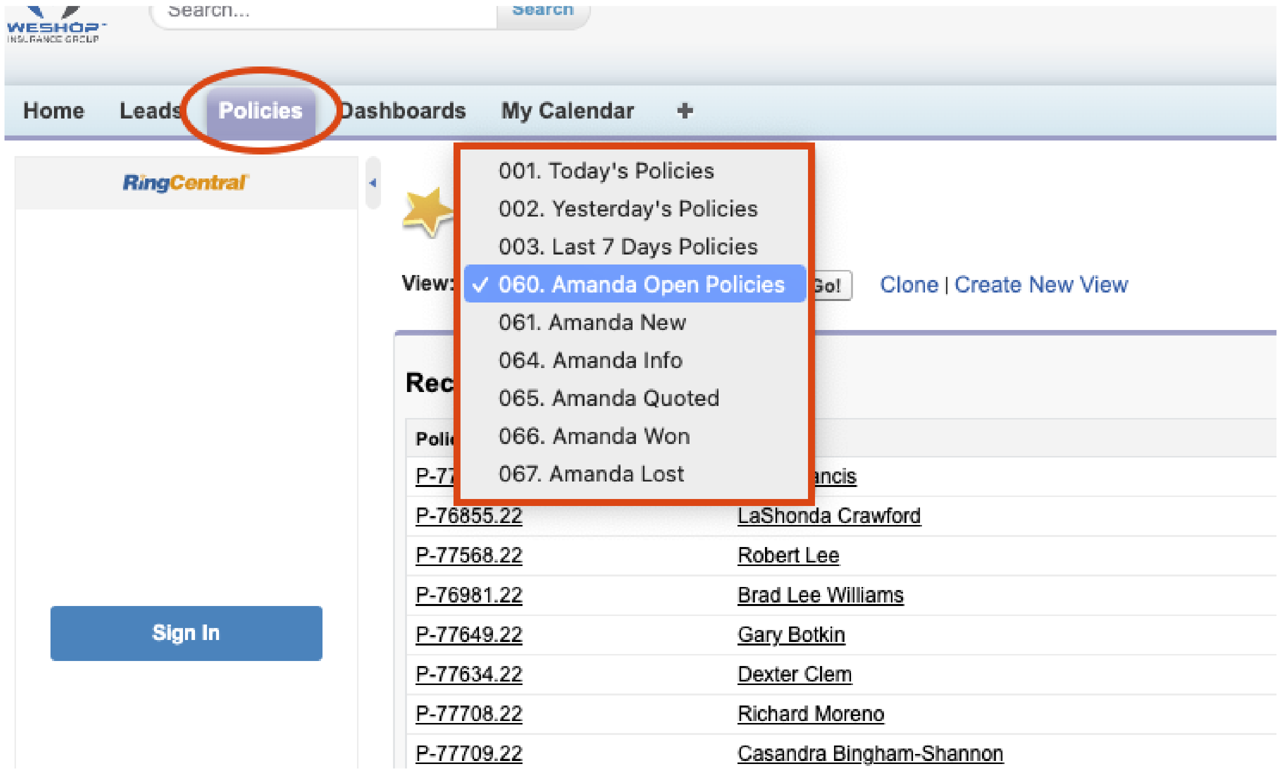
There are no related Leads to display for Jamiel Phillips.

Always check for Related Leads to see if it was submitted twice or another Rep is already working with this client. If so, let Mike or Liz know so they can Delete the duplicate.

Policy Data Entry & Policy Status Buckets 6:36

Policy Status Buckets

- Leads are the clients. You will enter Internal notes and attach documents in each Lead, however, you **work** the **open policies** for your clients by using the Policy Tab.



- The most important TRACKING FIELDS for Policies are:
  - **Sales Status:** Each policy should be categorized into one of these "sales statuses" or "buckets". You can use the pulldown under the Policy Tab to look at your "open" policies in these same "buckets":
    - **New** - NO Contact. You've not called or left VM for the client yet.
    - **Info** - Need Info. You've talked to, or sent or received email/text/VM, but need more info in order to quote.
    - **Quoted** - You've completed the quote and are working to close it.
    - **Lost** - Client decides not to buy from you, or unresponsive over time.
    - **Won** - Policy is issued.
  - **Next Step:**
    - This is **THE MOST IMPORTANT** field in the policy area. Enter the next date that you need to engage with the client. Will help you sort to-do's.
    - See Examples of policy "Info" and "Quoted" buckets below:

064. Amanda Info | Edit | Delete | Create New View

Most important field.
Next step for follow ups

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Policy ID	Created Date	Lead	Lead Company Name	Lead Origin	Zone	Next Step ↑	Sales Status
Edit | Del	P-77690.22	6/16/2022	Emmanuel Opoku	E & G Express Ship…	Web Form	ND	6/20-Day2	Info
Edit | Del	P-77692.22	6/16/2022	Patrick Ayers	PNA INC	Web Form	MT	6/20-Day2	Info
Edit | Del	P-77645.22	6/14/2022	Correy Peters	C M Peters Truckin…	Web Form	MN	6/20-Day4	Info
Edit | Del	P-77652.22	6/14/2022	Felipe Gonzalez	N/A	Web Form	TX	6/20-Day4	Info
Edit | Del	P-77663.22	6/15/2022	Abdullah Saleem	Prince J Automotive…	Web Form	IL	6/21-Day4	Info
Edit | Del	P-77674.22	6/16/2022	Nancy Ortiz	Ortiz Mobile Auto R…	Manual	OR	6/21-Day4	Info
Edit | Del	P-77678.22	6/16/2022	Yonas Demeke	N/A	Web Form	WA	6/21-Day4	Info
Edit | Del	P-77619.22	6/13/2022	Marvin Martin	Super Marv LLC	Manual	MS	6/21-Day7	Info
Edit | Del	P-77579.22	6/9/2022	Oliver Hughey	Justin Hughey Logg…	Manual	TX	6/22-Day7	Info
Edit | Del	P-77538.22	6/7/2022	Dionel Williams	Seventy-Five Expre…	Web Form	TX	6/22-F/U	Info

025. Deborah Quoted | Edit | Delete | Create New View

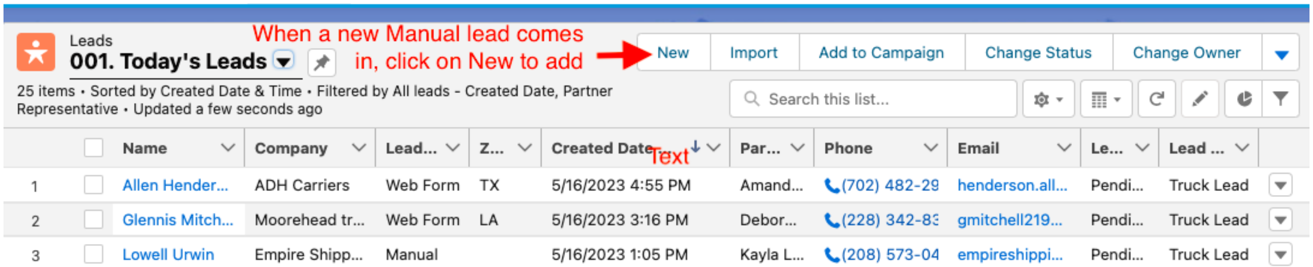
Most Important field -
sorting "to do's".

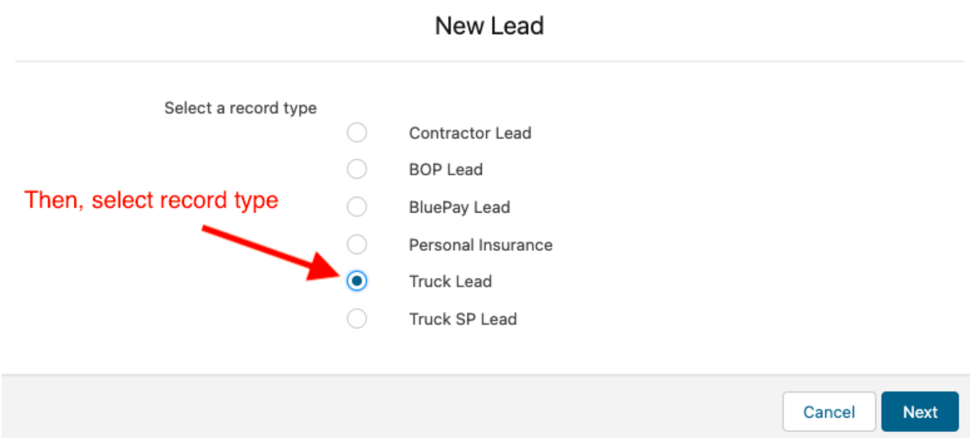
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Othe

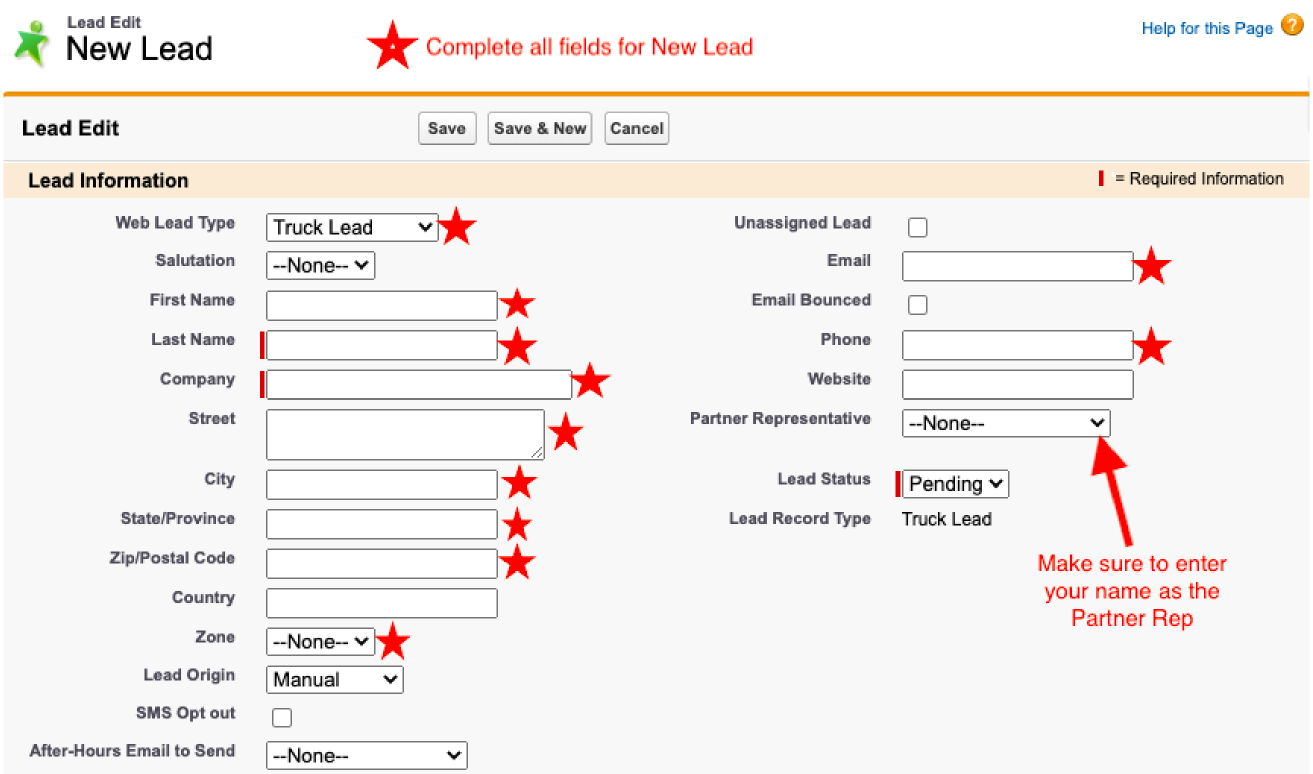
Action	Policy ID	Created Date	Lead	Lead Company Name	Zone	Next Step ↑	Sales Status	C…	Policy ..
Edit | Del	P-76101.22	4/12/2022	Dennis Curry	Security Nest LLC	IL	1/2023 AOR	Quoted		Truck
Edit | Del	P-76750.22	4/29/2022	Raul Ruiz	I'ma Hauling	TX	1/2023 AOR	Quoted		Truck
Edit | Del	P-29825.19	2/1/2019	George Slaughter	BCC Slaughter Truc…	MO	12/1	Quoted		Truck
Edit | Del	P-77679.22	6/16/2022	Marcus Warner	Monday Thru Sund…	GA	6/20	Quoted		Truck
Edit | Del	P-74967.22	2/24/2022	Andres Medina	HM Logistics LLC	NC	6/20	Quoted		Truck
Edit | Del	P-75104.22	3/3/2022	Lenette Rose	Duslen Freight LLC	GA	6/20	Quoted		Truck
Edit | Del	P-76941.22	5/10/2022	Broderiek Montay J…	Johnson Farms LLC	WV	6/20 **David	Quoted	P…	Truck
Edit | Del	P-77648.22	6/14/2022	Roger Vincent	Vincent Transport L…	KY	6/20 BIND	Quoted		Truck
Edit | Del	P-77677.22	6/16/2022	Richard Gilchrist	Rich Gilchrist Trucki…	NM	6/20 BIND	Quoted		Truck
Edit | Del	P-76882.22	5/5/2022	Dilami Augustin	P-AUGUSTIN LLC	NJ	6/20 BIND **David	Quoted	P…	Truck
Edit | Del	P-77629.22	6/13/2022	Jermaine Robinson	J & J Robinson Tru…	LA	6/21 Berkshire	Quoted		Truck
Edit | Del	P-77490.22	5/31/2022	Jewel Boakai-Kutua…	Miracle Transportati…	ND	6/21 BIND	Quoted		Truck
Edit | Del	P-77641.22	6/14/2022	Layth Issaq	LI Trucking LLC	MI	6/21 BIND	Quoted		Truck

Add Manual Lead From Call 🎥 1:21

- Inbound phone calls will require you to create a new lead from scratch.
  - Technique:
    - Go to the LEADS tab
    - Use pulldown to select "Today's Leads"
    - Click "NEW" button
    - Select "LEAD RECORD TYPE" as "TRUCK"
    - Enter Client Information


Leads
001. Today's Leads
When a new Manual lead comes in, click on New to add
New
Import
Add to Campaign
Change Status
Change Owner
25 items • Sorted by Created Date & Time • Filtered by All leads - Created Date, Partner Representative • Updated a few seconds ago
Search this list...
Name | Company | Lead... | Z... | Created Date | Par... | Phone | Email | Le... | Lead ...
Text
1 Allen Hender... ADH Carriers Web Form TX 5/16/2023 4:55 PM Amand... (702) 482-29 henderson.all... Pendi... Truck Lead
2 Glennis Mitch... Moorehead tr... Web Form LA 5/16/2023 3:16 PM Debor... (228) 342-83 gmitchell219... Pendi... Truck Lead
3 Lowell Urwin Empire Shipp... Manual 5/16/2023 1:05 PM Kayla L... (208) 573-04 empireshippi... Pendi... Truck Lead


New Lead
Select a record type
Contractor Lead
BOP Lead
BluePay Lead
Personal Insurance
Truck Lead
Truck SP Lead
Then, select record type
Cancel
Next


Lead Edit
New Lead
Complete all fields for New Lead
Help for this Page
Lead Edit
Save
Save & New
Cancel
Lead Information
= Required Information
Web Lead Type
Truck Lead
Salutation
--None--
First Name
Last Name
Company
Street
City
State/Province
Zip/Postal Code
Country
Zone
--None--
Lead Origin
Manual
SMS Opt out
After-Hours Email to Send
--None--
Unassigned Lead
Email
Email Bounced
Phone
Website
Partner Representative
--None--
Lead Status
Pending
Lead Record Type
Truck Lead
Make sure to enter your name as the Partner Rep

Module 3: Salesforce II

Closing Deals

Checklist For Closing Deals

- Send application and any other documents that require signature (ex. EFT forms, UM/UIM Rejection, etc.) to your client via DocuSign and make sure we have the **signed app returned to us within 24 to 48 hours of issuing the policy**. The signed app will be saved in the clients Salesforce record.
- Search for the client using the search box, then scroll down and click on relevant policy in the policy section. This will take you to the client's policy page
- Double click on Policy Number section and enter new policy number
- Policy Category should be 'Truck'
- Policy Type most often will be 'Truck', but others can apply (Endorsement, Non Business, Non Truck)
- Enter amount of premium in Premium (Only) section
- On right side select Carrier name
- Enter Sold Date
- Enter Effective Date of policy
- Enter Policy Term (normally one year)
- No need to enter Expiration Date if it's a new policy. It will auto-fill.
- Change Sales Status to Won
- Make sure your name is selected for Partner Representative
- **Remember to click "Save" often!**
- You can then go back to the left side and click on the underlined Lead Name and it will take you back to the Lead page for that customer.
- See example below:

Policy
P-74528.22

Example of completed fields on a Won (sold) Policy

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Leads

Sales Records [0] | Renewal Record [0] | Policy Events [0] | Open Activities [0] | Activity History [0] | Policy History [21]

Policy Detail Edit Delete Send Email Policy Event Policy Renewal

Policy ID	P-74528.22	Carrier	Progressive
Lead	Derrick Cook, Big Ticket Enterprise LLC	Sold Date	3/8/2022
Policy Number	04372398-0	Effective Date	3/8/2022
Policy Category	Truck	Policy Term	1 Year
Policy Type	Truck	Expiration Date	3/8/2023
Endorsement Type		Next Step	
Quote Number		Sales Status	Won
Premium (Only)	$21,231.21	Lost Reason	
Broker Fee	$0.00	Partner Representative	Amanda Ridge
Payment Received	$4,906.03	LM Sales Rep	
Amt Paid to Carrier	$4,906.03	LM Sales Rep	
Carrier Payment Method	Customer Credit Card	Current Policy	✓
Date Carrier Paid	3/8/2022	Record Type	Original Sale [Change]
Financed Thru		Lead Origin	Web Form

AOR Opportunities

- Often leads are not happy with their agents and are already with Progressive. Many current Progressive clients will gladly switch to WeShop™. We believe our communication systems and industry-leading customer service adds great value to these clients. Build relationships and AOR's are likely to follow.
- For Progressive, have the insured complete the highlighted sections of their AOR form (see below) and return to you using DocuSign. Once received, fill out your portion and fax to Progressive at (800) 556-0014. The fax number is also at the bottom of the form.
- Progressive will not release the policy for the new agent to view until they process this form which usually takes a minimum of 12 business days. On the 12th day, call Progressive at (877) 776-2436 to verify that the AOR has been processed.
- Commissions on AOR policies will be paid at the next renewal.
- **IMPORTANT: Leave policy as "Quoted" after receiving signed AOR. Do NOT change to "Won"**, our Admin team will do that when the renewal is confirmed and commission is received.
- View Highlighted Progressive AOR Form. This form can be accessed in the Salesforce Action Panel under "Quick Links".
- See AOR example below:

PROGRESSIVE

Agent/Broker Change Request

PLEASE READ THE FOLLOWING CAREFULLY: To change the agent/broker of record on your policy, provide the information below. For this request to be processed it must be complete and accurate, and it must be signed by the Named Insured or an authorized requestor and by the new agent/broker.

By making this request, you certify that you understand all the following:

1) **You are requesting to change the agent/broker of record on your policy.**
2) **After your request is processed your current agent/broker will no longer be authorized to service your policy, including making changes to and gathering information about your policy.**
3) **Changing your agent/broker of record should not be an attempt to reduce premium, and changes made to your policy by the new agent/broker of record are subject to an underwriting review by Progressive that could result in a premium increase.**

Policy Information:

Named Insured: Stack the Deck LLC dba Stack the Deck Transportation
Policy Number: 03968008-1
Current Agency/Broker Name: Mustard Seed Financial

New Agent/Broker Information:

Agency/Broker Name: **WeShop Insurance Group**
Agent/Broker Code: **017SZ**
Producer Name: **Michael Jakubik**
Agent Address: **PO BOX 622795 Oviedo, FL 32762**
Agent Phone Number: **866-444-2462**

Complete ALL fields on form other than signatures prior to sending thru DocuSign.

X Corey Bowen — 6/13/2022
Signature of Named Insured or authorized requestor — Date

Corey Bowen
Print Name

Docusign signing order: Client first then Agent

AGENT/BROKER ACKNOWLEDGEMENT: Per your Producer's Agreement you have a duty to comply with our Underwriting Requirements and, after acquiring a policyholder, to **immediately obtain all original signed applications, selections and rejections of optional coverages, and all other records relating to the policy**. All records must be maintained pursuant to the Producer's Agreement and all applicable state laws. If attempts to obtain records from the prior agent/broker are unsuccessful, then you must obtain new signature forms from the policyholder for any coverage rejections, lower limit elections, driver exclusions, and payment authorizations. Failure to do so may qualify as an error or omission by your agency and could result in the termination of your Producer's Agreement.

X Michael Jakubik — 06/13/2022
Signature of new Agent/Broker — Date

Michael Jakubik
Print Name

Customer Service: 1-800-925-2886 | Open 24/7

Personal Lines
P.O. Box 6807
Cleveland, OH 44101
Fax: 1-800-229-1590

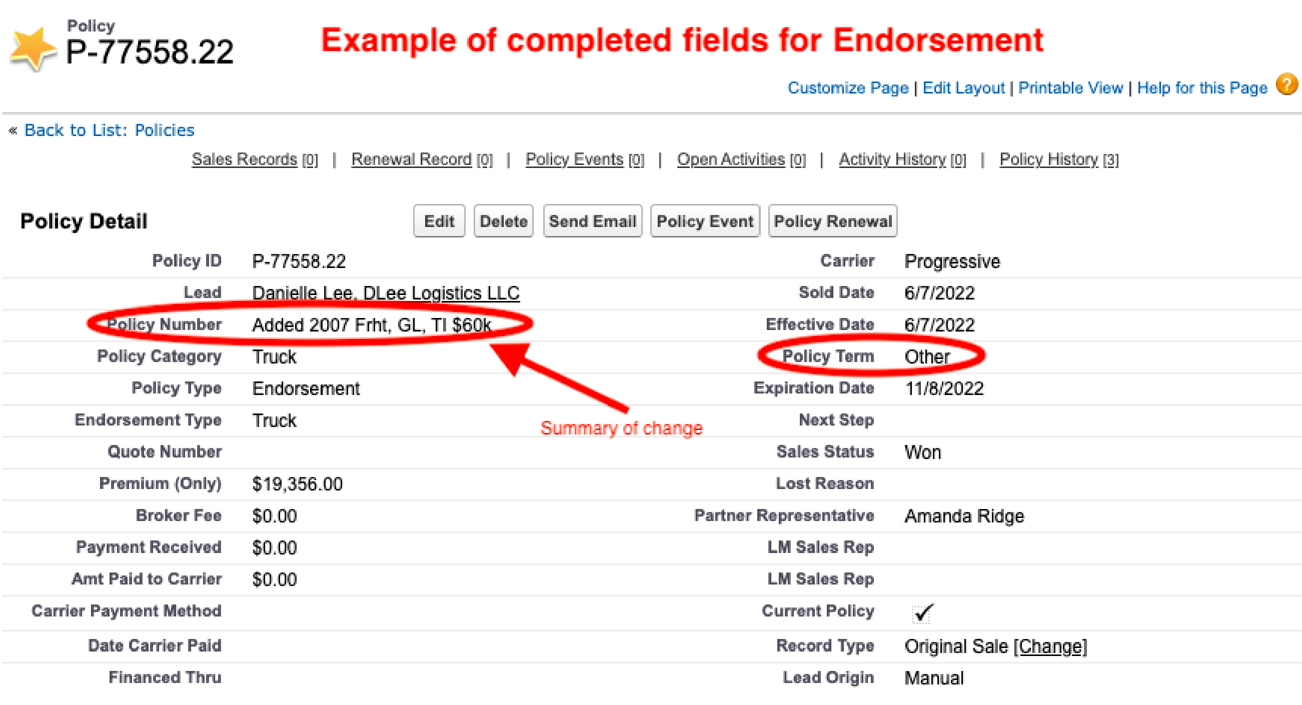
Commercial Lines
P.O. Box 94739
Cleveland, OH 44101
Fax: 1-800-556-0014

Entering Policy as Won (Sold) 🎥 1:39

- When you sell a policy, change the Policy “Sales Status” as WON
- Confirm that all policy information is entered.
- You will see [Your Dashboard] data update when you refresh the page.

Adding Endorsements 🎥 2:16

- To add a Policy to an existing lead, use the Search Box to find the correct client / lead
- Scroll down to the POLICIES area of the Lead.
- Above the POLICIES section you will see a “ADD POLICY” Button. Click it.
- In the Policy Number field type in a brief description of the endorsement to the policy (ie. added driver, increased radius) instead of the actual policy number.
- Premium (Only) enter prorated amount of the premium change.
- On right side select Carrier name
- Enter Sold Date
- Enter Effective Date of the endorsement
- **IMPORTANT**: **An endorsement Policy Term should be set to “OTHER”** and then manually enter the expiration date of the original policy since the endorsement timing aligns with the original policy.
- Change Sales Status to Won
- Make sure your name is selected for Partner Representative
- **Remember to click “Save” often**


Policy
P-77558.22

Example of completed fields for Endorsement

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Policies

Sales Records [0] | Renewal Record [0] | Policy Events [0] | Open Activities [0] | Activity History [0] | Policy History [3]

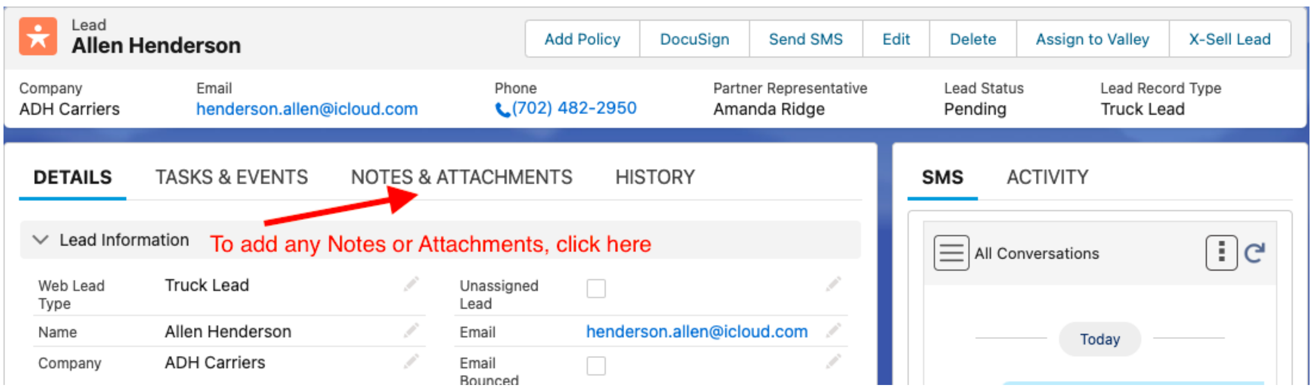
Policy Detail Edit Delete Send Email Policy Event Policy Renewal

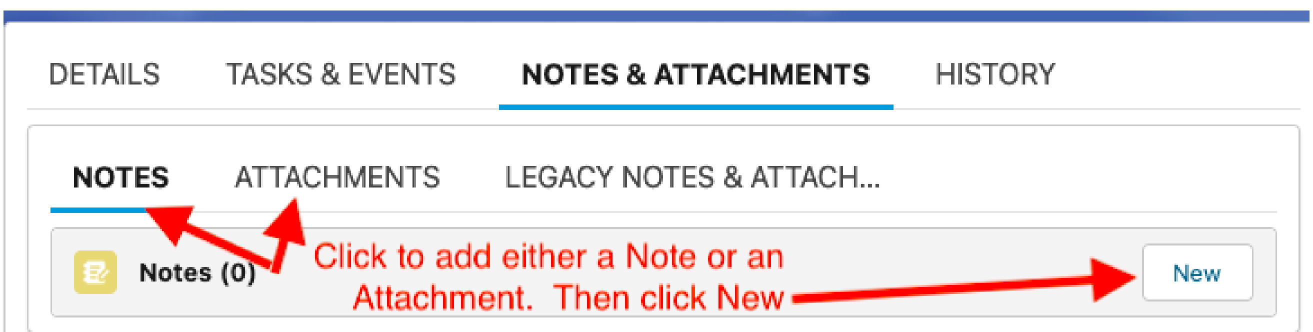
Policy ID	P-77558.22	Carrier	Progressive
Lead	Danielle Lee, DLee Logistics LLC	Sold Date	6/7/2022
Policy Number	Added 2007 Frht, GL, TI $60k	Effective Date	6/7/2022
Policy Category	Truck	Policy Term	Other
Policy Type	Endorsement	Expiration Date	11/8/2022
Endorsement Type	Truck	Next Step	
Quote Number		Sales Status	Won
Premium (Only)	$19,356.00	Lost Reason	
Broker Fee	$0.00	Partner Representative	Amanda Ridge
Payment Received	$0.00	LM Sales Rep	
Amt Paid to Carrier	$0.00	LM Sales Rep	
Carrier Payment Method		Current Policy	✓
Date Carrier Paid		Record Type	Original Sale [Change]
Financed Thru		Lead Origin	Manual

Summary of change

Attaching Notes & Documents

- Towards the top of every client / lead is a section called “Notes & Attachments” to enter important client information and documents.
- IMPORTANT: Notes and attachments are in the LEAD - *not* in the POLICY.
- There are two buttons in this “Notes & Attachment” section:
  - ATTACH FILE: You can upload clients documents here
  - NEW NOTE: You can enter a reference note here or copy and paste an email that you received from the client to include date/time stamp





Other Leads Sections 🎥 0:57

- Policy Events
- SMS
- Open Activities
- Activity History

Servicing Clients

Certificates & Billing Support

- It's important to know how to process COI's for your clients, however, Casey ext 104 can assist with most of your COI and billing requests. You can forward your requests directly to her at coi@weshop10.com.
- Progressive can also service clients with COI's and payment support **(800) 876-5581**. Mike will explain best practices for minimizing hold times with Progressive.

Endorsements

- We encourage all of our reps to keep strong relationships with all of your clients. The incentive to do this is to earn commissions on endorsements as your clients grow. Make it easy for them to call you when they are adding drivers and/or vehicles.

Phone Tree

- Our phone system is quite powerful. If you don't answer an inbound call to your direct line, the caller will select from several prompts. For example, If the caller is looking for a COI or has a billing question, the call will be routed either directly to Progressive, or to our service team. If they need a policy or endorsement, the system prompts them to leave a voicemail for you.

Your Dashboard

- Each rep has a dashboard to track key statistics.
- Your Dashboard tracks these stats:
    - Today's Leads, Deals and Premium Tallies
    - Policy Counter by Buckets (New, Info, Quoted)
    - Monthly Leads, Deals and Premium Tallies
    - Last 30 days of Leads, Deals and Premium
    - Current Month Premium Tallies for all Truck Reps
- To access your Dashboard, follow these steps:
    - Step 1: Click on the Dashboard tab at the top of Salesforce.
    - Step 2: Select the down arrow to the right of the "Find a Dashboard" search box.
    - Step 3: When you see your dashboard, click on it.

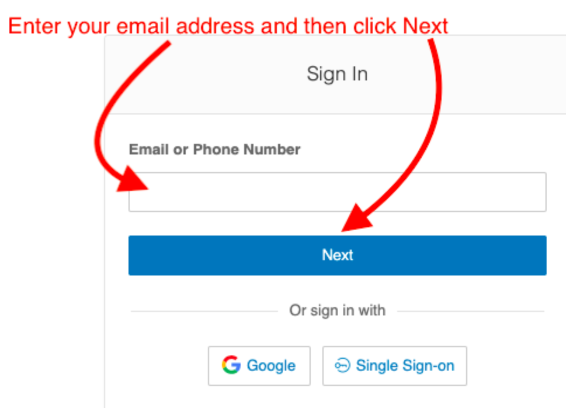
Best Practices :: Module 4

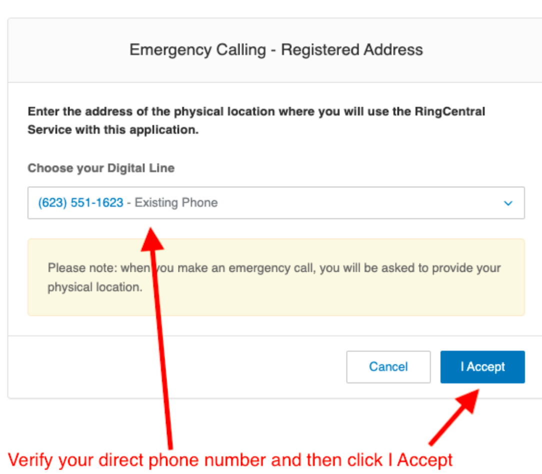
Version 8.0 :: Lightning :: May 22, 2023

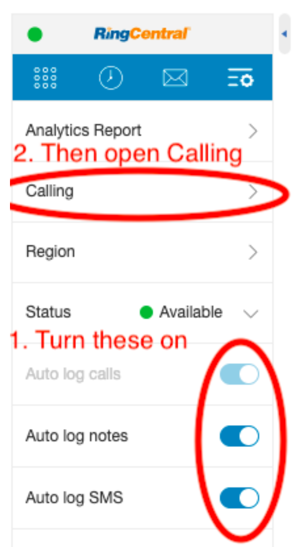
Module 4: Communications

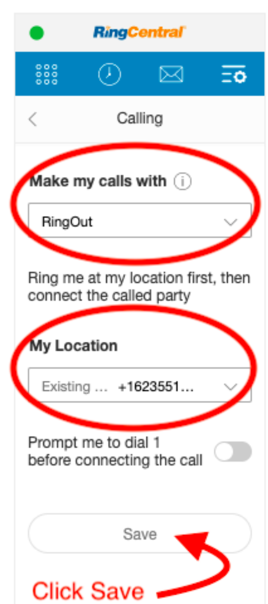
Click to Dial 🎥 0:50

- **ACTIVATE Click-to-Dial**

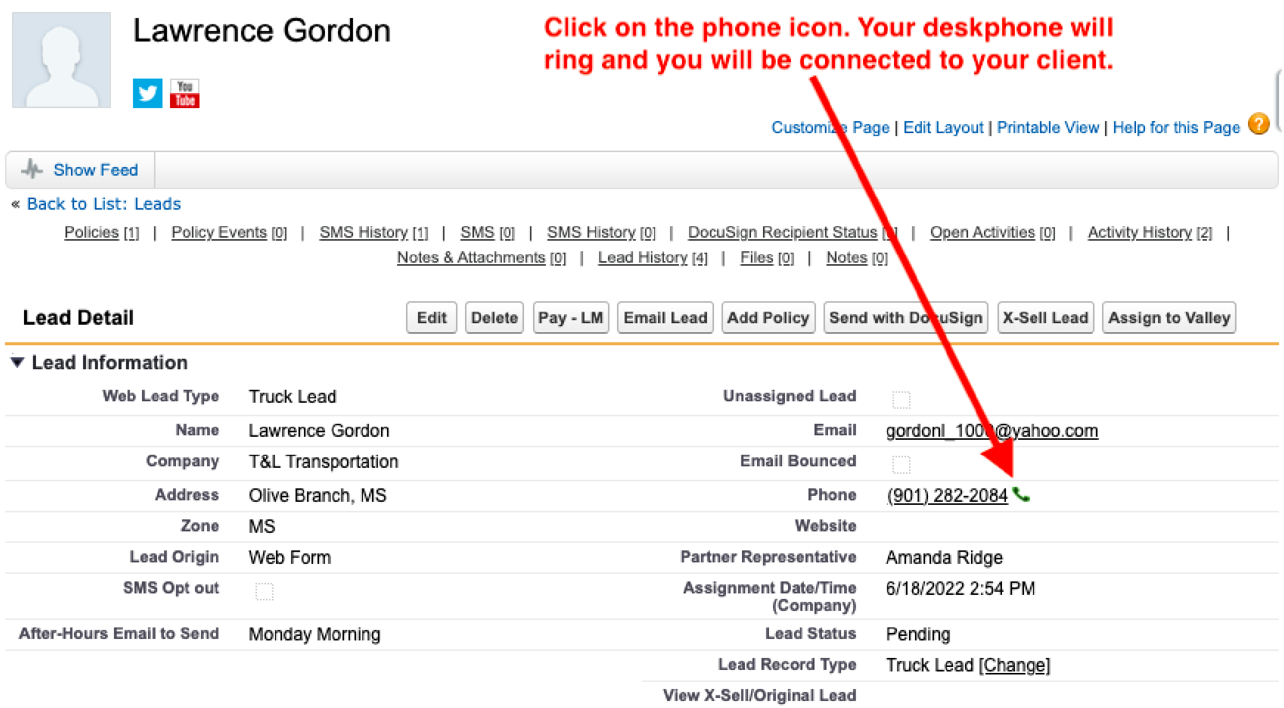








- **USING Click-to-Dial**
  - Instead of pickup up your phone and dialing a 10-digit number, our system will do that for you. Follow these steps:
    - Step 1: Use Search Box to find a Lead / Client
    - Step 2: Click the " 📞" next to the phone number
    - Step 3: Your desk phone will ring - pick it up
    - Step 4: Once you answer, The computer will auto-dial the client number.
    - **IMPORTANT:** Using this feature to call clients automatically logs a record with the timestamp of the call in the LEAD "Activity History" section.

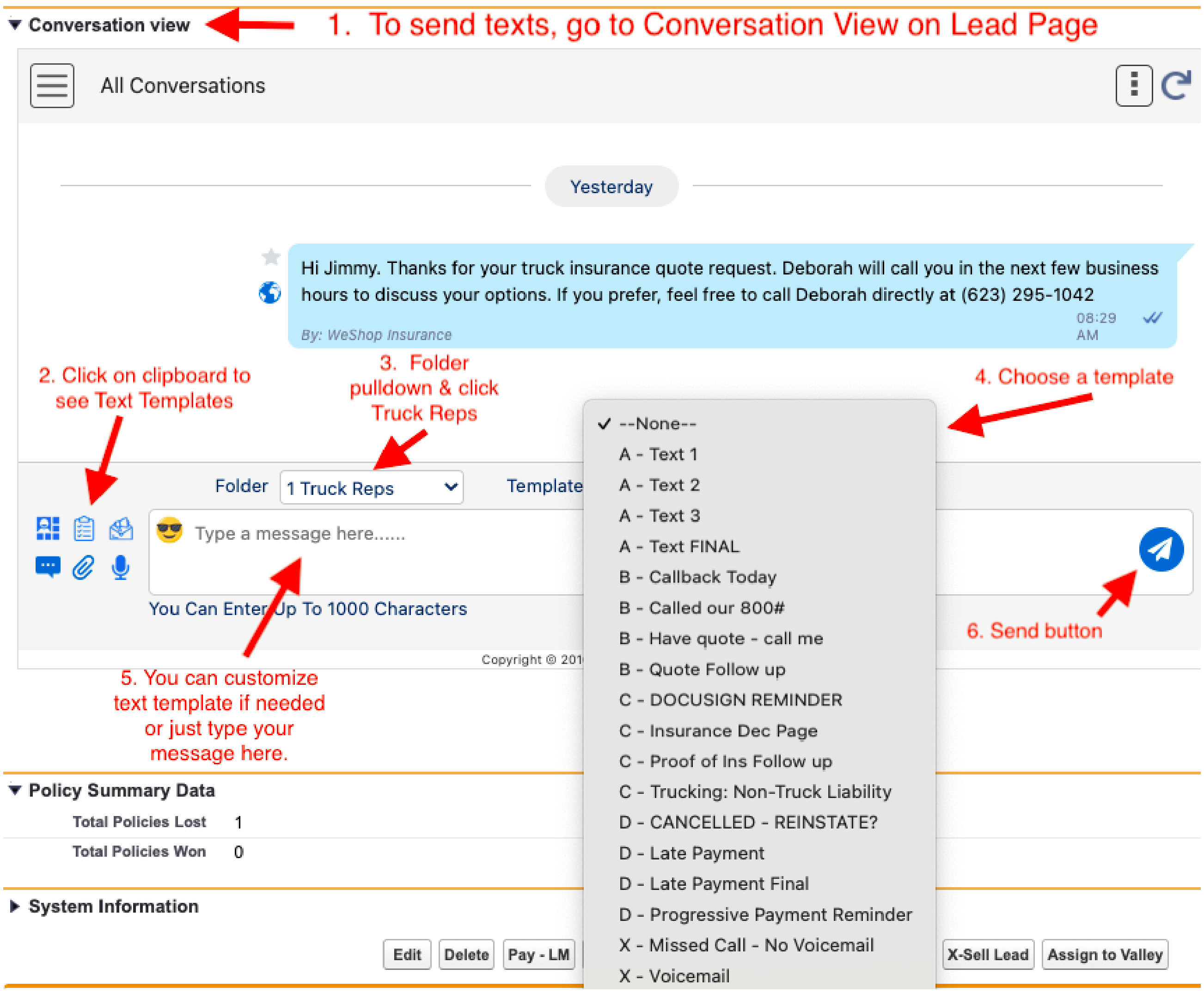


Texting Clients

- You can send SMS / Texts to your customers. It's a great way to avoid the "noise" all of our clients have with spam callers and too many emails. Sending an SMS/Text is a great way to let them know you are about to call.
- **SMS Free Form**
  - Step 1: On Lead, scroll down to the "Conversation View"
  - Step 2: Enter your text in the box. Click send button (blue paper airplane)
  - Step 3: All SMS inbound and outbound are logged in "Conversation View".

- **SMS Templates**
  - Step 1: On Lead, scroll down to the “Conversation View”
  - Step 2: Select “Clipboard” icon, Select “Truck Rep” Folder, Choose Template
  - Step 3: Modify or customize if needed. Click send button (blue paper airplane)
  - Note: Click 😎 top left of the text area to add emojis.

- **SMS Conversation View**



- **IMPORTANT** - You can receive text messages with **photo** attachments.
  - Have your client send texts/pics/videos to your work phone number.
    - Drivers Licenses
    - VIN Numbers
    - Documents
  - You can receive an email with the info that was sent via text to your work #.

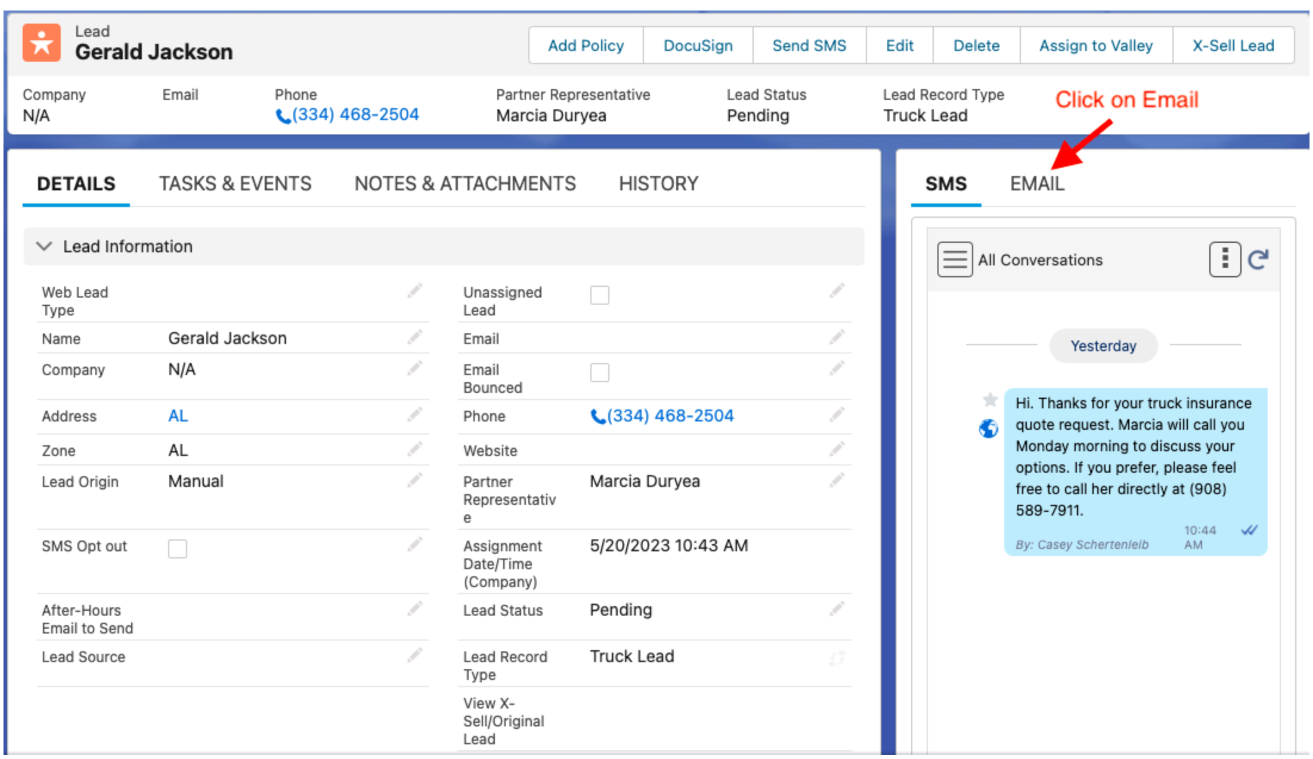
- Create a Test Record and use your mobile number to practice using this tool and selecting different text templates.

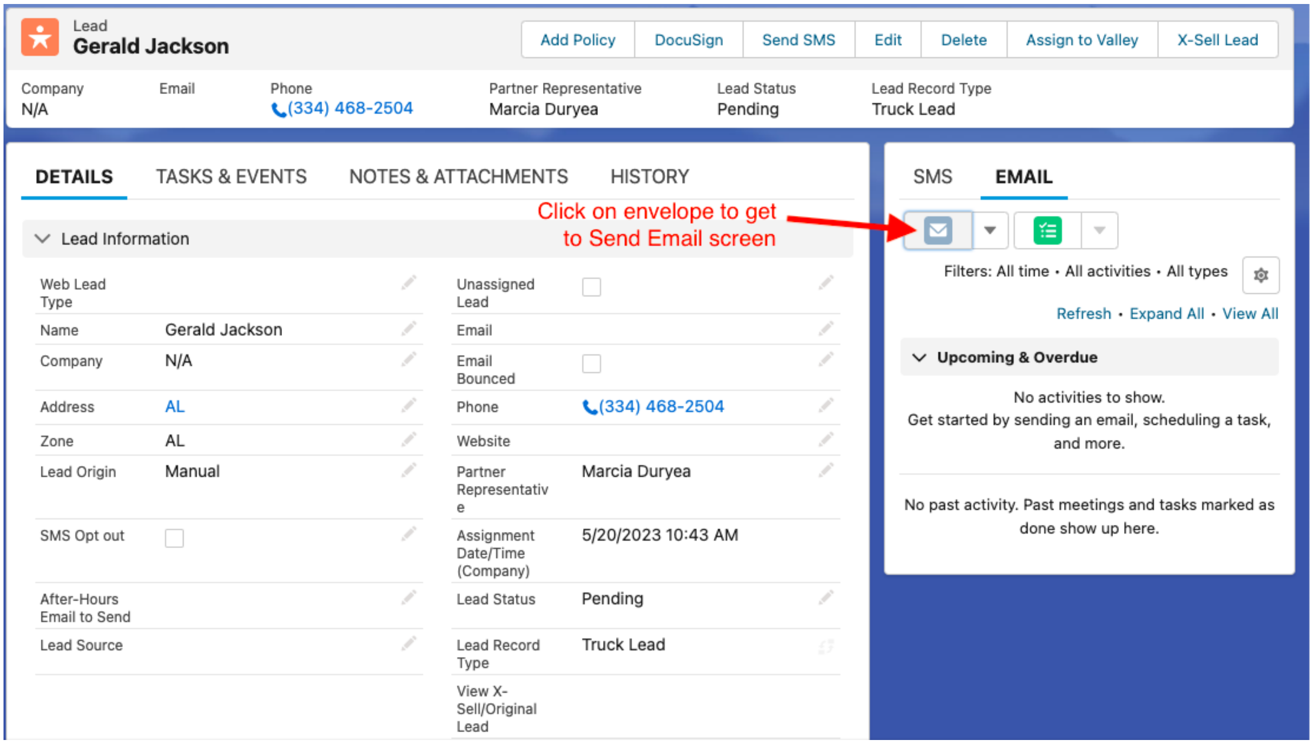
Emailing Clients

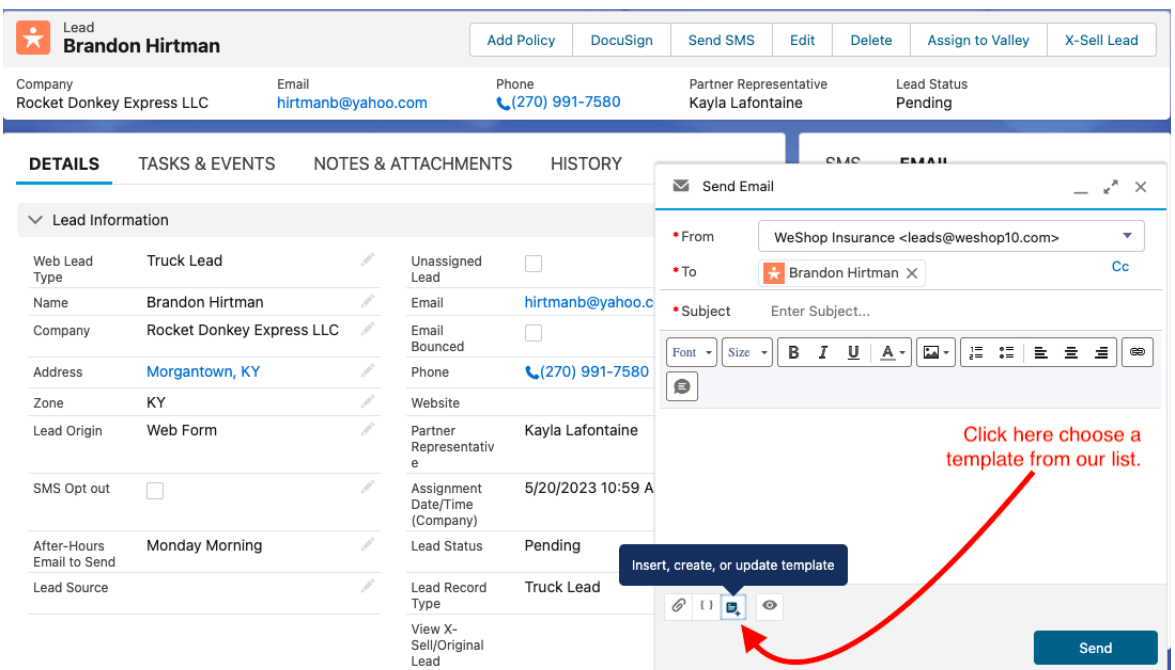
- We have a library of email templates that you can use with your clients. To email your client, follow these steps:
  - Step 1: Use the “Search Box” to find the client
  - Step 2: Click the “Email” button near the top right side of the Lead page
  - Step 3: Click the "Envelope" to get to the Send Email screen. A Send Email screen will pop up,
  - Step 4: Click the third icon at the bottom to view the available templates.
  - Step 5: Under "Template Folders" use the pulldown menu and select Truck. Then select the Template you want to use. Make small changes to the template if necessary
  - Step 6: Send the email

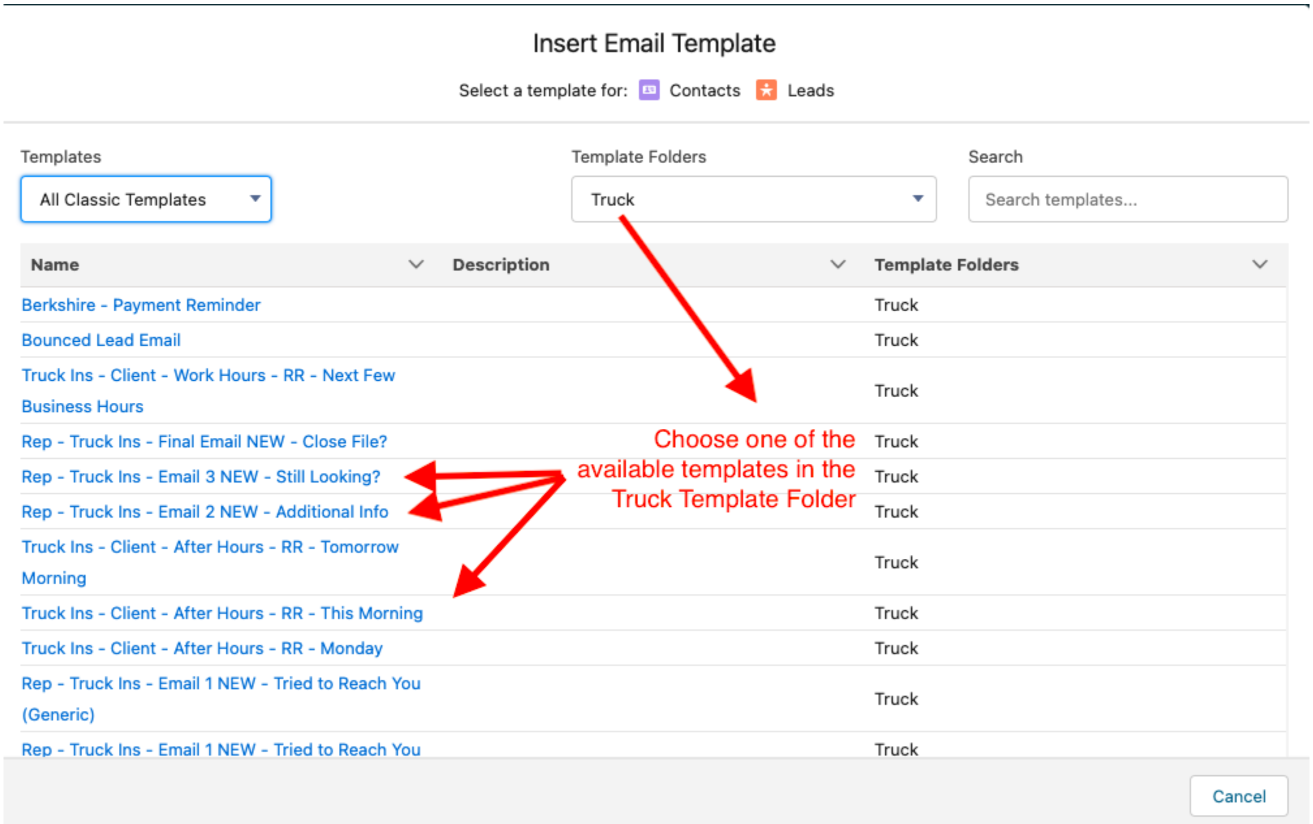
- NOTE: Emails sent from within SF will be logged in LEAD “Activity History”

- Create a Test Record and use your email address to practice using this tool and selecting different email templates. As you test, confirm that you can find the log of each email in Lead “Activity History”.




Lead
Gerald Jackson
Add Policy
DocuSign
Send SMS
Edit
Delete
Assign to Valley
X-Sell Lead
Company
N/A
Email
Phone
(334) 468-2504
Partner Representative
Marcia Duryea
Lead Status
Pending
Lead Record Type
Truck Lead
DETAILS
TASKS & EVENTS
NOTES & ATTACHMENTS
HISTORY
Click on envelope to get
to Send Email screen
Lead Information
Web Lead Type
Name
Gerald Jackson
Company
N/A
Address
AL
Zone
AL
Lead Origin
Manual
SMS Opt out
After-Hours Email to Send
Lead Source
Unassigned Lead
Email
Email Bounced
Phone
(334) 468-2504
Website
Partner Representative
Marcia Duryea
Assignment Date/Time (Company)
5/20/2023 10:43 AM
Lead Status
Pending
Lead Record Type
Truck Lead
View X-Sell/Original Lead
SMS
EMAIL
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.


Lead
Brandon Hirtman
Add Policy
DocuSign
Send SMS
Edit
Delete
Assign to Valley
X-Sell Lead
Company
Rocket Donkey Express LLC
Email
hirtmanb@yahoo.com
Phone
(270) 991-7580
Partner Representative
Kayla Lafontaine
Lead Status
Pending
DETAILS
TASKS & EVENTS
NOTES & ATTACHMENTS
HISTORY
Lead Information
Web Lead Type
Truck Lead
Name
Brandon Hirtman
Company
Rocket Donkey Express LLC
Address
Morgantown, KY
Zone
KY
Lead Origin
Web Form
SMS Opt out
After-Hours Email to Send
Monday Morning
Lead Source
Unassigned Lead
Email
hirtmanb@yahoo.c
Email Bounced
Phone
(270) 991-7580
Website
Partner Representative
Kayla Lafontaine
Assignment Date/Time (Company)
5/20/2023 10:59 A
Lead Status
Pending
Lead Record Type
Truck Lead
View X-Sell/Original Lead
Send Email
From
WeShop Insurance <leads@weshop10.com>
To
Brandon Hirtman
Cc
Subject
Enter Subject...
Font
Size
Click here choose a
template from our list.
Insert, create, or update template
Send



Template Timeline

- To speed up your communications with clients, we've created a set of text and email templates for you to use within Salesforce. As always, when you send emails and texts from within Salesforce, they are logged within the client "lead".
- Objective: The goal of this process is to engage with the client as quickly as possible using a combination of texts, calls and emails. **We find that a text a few minutes before a call dramatically increases the % of clients who answer** because they know it's not spam.

Web Forms

- **Day 1 - Steps: Call, Text 1, Email 1**.
    - Step 1: **Call** - Initial SMS & Email are automated. They are logged in the lead page. Call lead, if no answer, leave a voicemail, and continue with Step 2 and 3.
    - Step 2**: Text 1 -** If you leave a voicemail or are unable to reach them, immediately send Text 1 to let them know you tried to reach them and provide your call back number.
    - Step 3: **Email 1** - After sending Text 1, immediately send Email 1. They know you tried to reach them and will have your direct phone number.
- **Day 2 - Steps: Call, Text 2, Email 2**

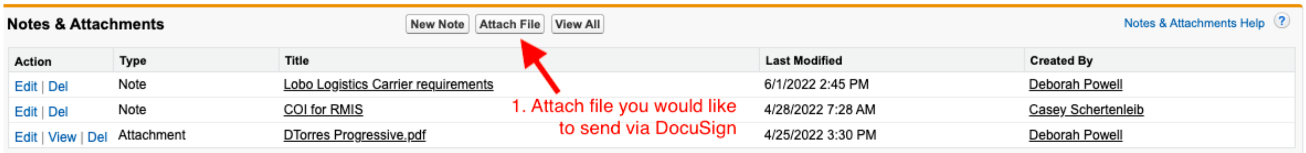
- **Day 4 - Steps: Call, Text 3, Email 3**
- **Day 7 - Steps (Final): Call, Final Text, Final Email, Policy to "Lost"**

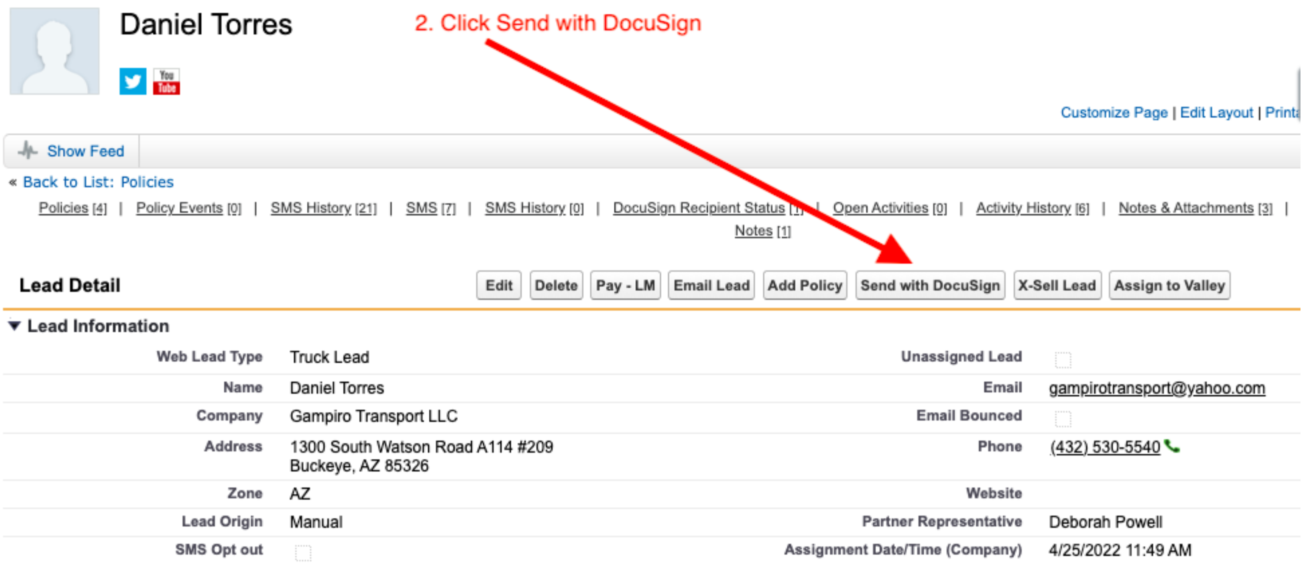
Voicemails to 800 Number - Steps: Text & Call

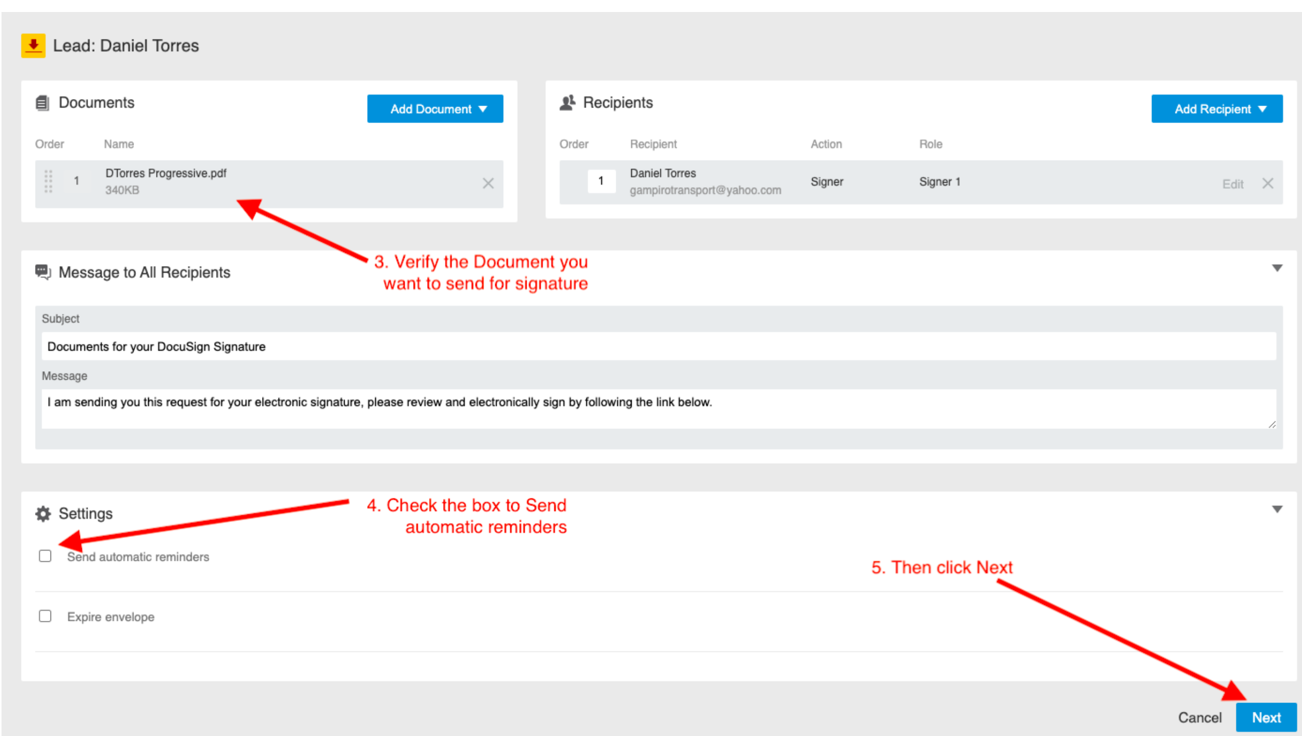
- **Enter Manual Lead** - Every VM should be entered in SF as long as you have a first and last name, and phone number.
- **Send Text** - Select the appropriate SMS Template ("Voicemail"). Text the Lead and let them know you received their VM, and will call them shortly. Also provide your direct phone number.
- **Call Lead** - Wait a few minutes, and look for 2 check marks in the lead conversation view. 1 check = delivered. 2 checks = read.

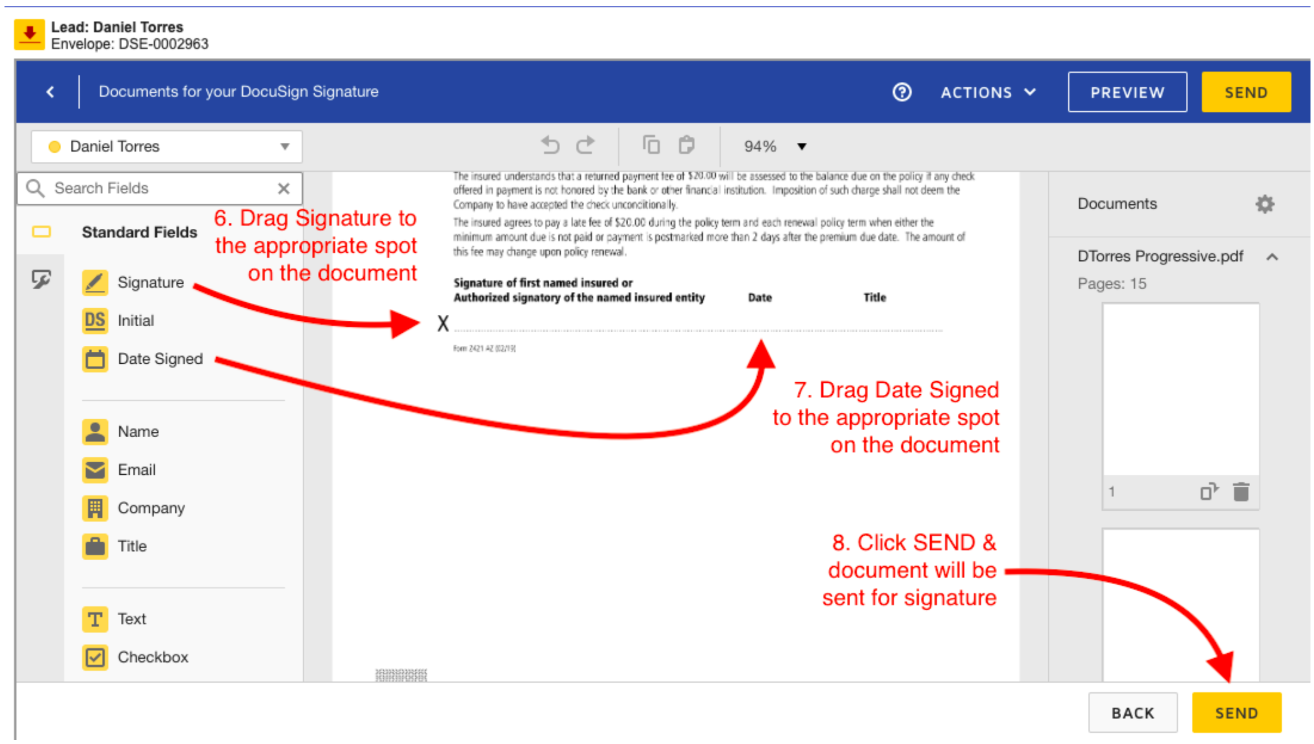
Document Signatures - DocuSign

- We will need copies of signed applications and other documents on file within each sold policy. DocuSign is an electronic method to get legal signatures from clients. You can send them a document to sign and the client can sign it using his/her mobile phone. It's super easy and by far the best way to get signatures. To send a docusign to a clients email, follow these steps:
    - Step 1: Make sure the document to sign is already attached in Salesforce.
    - Step 2: Click "DOCUSIGN" Button on the "Lead" page.
    - Step 3: Verify the Document(s) that need signature(s) are listed, "X" out the rest.
    - Step 4: Add Subject line: <Client Name> - Please Sign - <Document Type>
    - Step 5: Add Personal Note
    - Step 6: Drag "Sign", "Initial" and "Date" to areas in the documents
    - Step 6: Click "Send"
    - Email Notifications
        - Customer Gets Email to review then sign
        - You get 1st email confirmation when VIEWED
        - You get 2nd email confirmation when SIGNED
    - DocuSign Logs
        - Completed/Signed Documents are logged in "DocuSign" area of "Lead"
        - All DocuSign documents are accessible from your DocuSign account at www.docusign.com as a backup as well.


Notes & Attachments
New Note
Attach File
View All
Notes & Attachments Help
Action | Type | Title | Last Modified | Created By
Edit | Del | Note | Lobo Logistics Carrier requirements | 6/1/2022 2:45 PM | Deborah Powell
Edit | Del | Note | COI for RMIS | 4/28/2022 7:28 AM | Casey Schertenleib
Edit | View | Del | Attachment | DTorres Progressive.pdf | 4/25/2022 3:30 PM | Deborah Powell
1. Attach file you would like to send via DocuSign


Daniel Torres
2. Click Send with DocuSign
Customize Page | Edit Layout | Printa
Show Feed
« Back to List: Policies
Policies [4] | Policy Events [0] | SMS History [21] | SMS [7] | SMS History [0] | DocuSign Recipient Status [1] | Open Activities [0] | Activity History [6] | Notes & Attachments [3] | Notes [1]
Lead Detail
Edit
Delete
Pay - LM
Email Lead
Add Policy
Send with DocuSign
X-Sell Lead
Assign to Valley
Lead Information
Web Lead Type: Truck Lead
Unassigned Lead
Name: Daniel Torres
Email: gampirotransport@yahoo.com
Company: Gampiro Transport LLC
Email Bounced
Address: 1300 South Watson Road A114 #209
Buckeye, AZ 85326
Phone: (432) 530-5540
Zone: AZ
Website
Lead Origin: Manual
Partner Representative: Deborah Powell
SMS Opt out
Assignment Date/Time (Company): 4/25/2022 11:49 AM

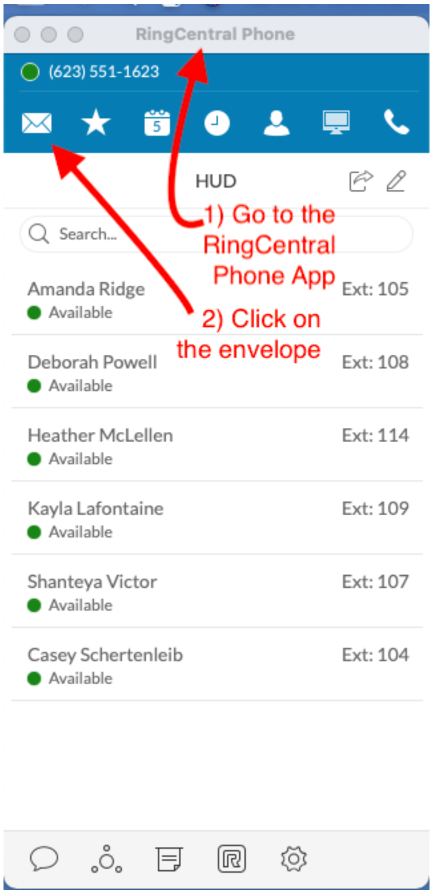

Lead: Daniel Torres
Documents
Add Document
Order | Name
1 | DTorres Progressive.pdf 340KB
Recipients
Add Recipient
Order | Recipient | Action | Role
1 | Daniel Torres gampirotransport@yahoo.com | Signer | Signer 1
Edit
3. Verify the Document you want to send for signature
Message to All Recipients
Subject
Documents for your DocuSign Signature
Message
I am sending you this request for your electronic signature, please review and electronically sign by following the link below.
Settings
4. Check the box to Send automatic reminders
Send automatic reminders
5. Then click Next
Expire envelope
Cancel
Next

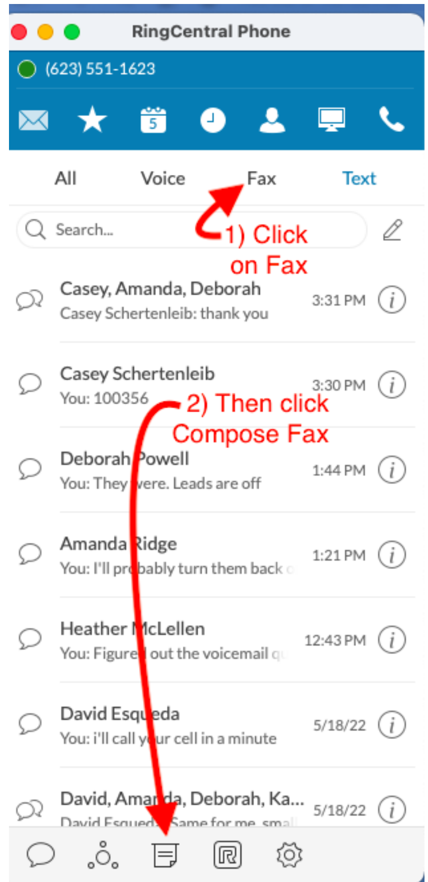


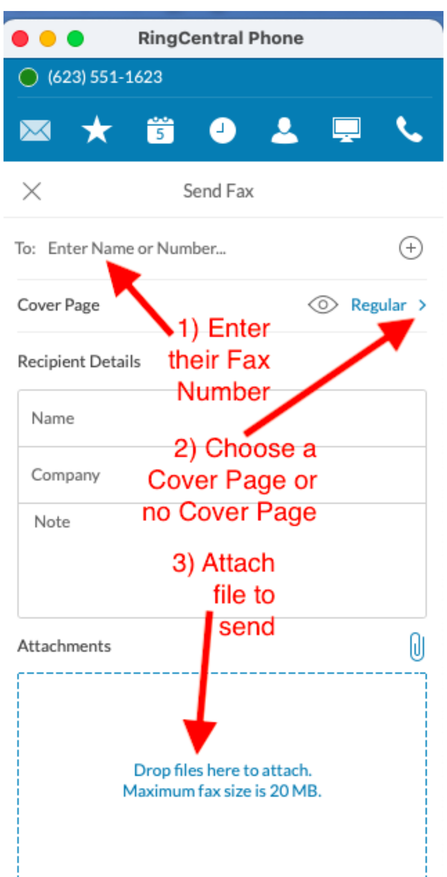
Sending Faxes

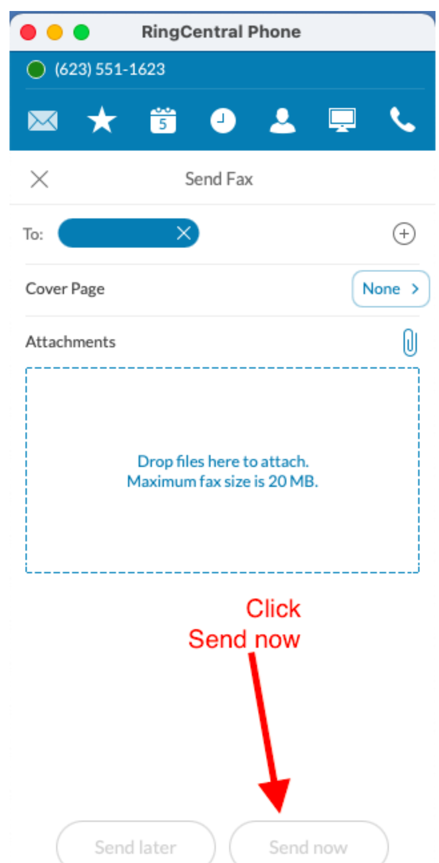
It's very simple to send a fax. Just follow these steps and our RingCentral Phone App will handle it for you. (See Screenshots below)

- Step 1: Open your RingCentral Phone App.
- Step 2: Click on the Envelope at the top left, then Click Fax. Then Click Compose Fax at bottom. Enter the fax number you would like to send to and complete Cover Sheet info if needed.
- Step 3: Now attach the document you'd like to fax and click Send now. And that's it! Your fax is on its way.
- You will receive an email confirmation when the fax is sent and received successfully.


RingCentral Phone
(623) 551-1623
HUD
Search...
1) Go to the RingCentral Phone App
2) Click on the envelope
Amanda Ridge
Available
Ext: 105
Deborah Powell
Available
Ext: 108
Heather McLellen
Available
Ext: 114
Kayla Lafontaine
Available
Ext: 109
Shanteya Victor
Available
Ext: 107
Casey Schertenleib
Available
Ext: 104


RingCentral Phone
(623) 551-1623
All
Voice
Fax
Text
Search...
1) Click on Fax
Casey, Amanda, Deborah
Casey Schertenleib: thank you
3:31 PM
Casey Schertenleib
You: 100356
3:30 PM
2) Then click Compose Fax
Deborah Powell
You: They were. Leads are off
1:44 PM
Amanda Ridge
You: I'll probably turn them back
1:21 PM
Heather McLellen
You: Figured out the voicemail
12:43 PM
David Esqueda
You: i'll call your cell in a minute
5/18/22
David, Amanda, Deborah, Ka...
5/18/22


RingCentral Phone
(623) 551-1623
Send Fax
To: Enter Name or Number...
Cover Page
Regular
Recipient Details
1) Enter their Fax Number
Name
Company
Note
2) Choose a Cover Page or no Cover Page
3) Attach file to send
Attachments
Drop files here to attach.
Maximum fax size is 20 MB.


RingCentral Phone
(623) 551-1623
Send Fax
To:
Cover Page
None
Attachments
Drop files here to attach.
Maximum fax size is 20 MB.
Click Send now
Send later
Send now

Receiving Faxes

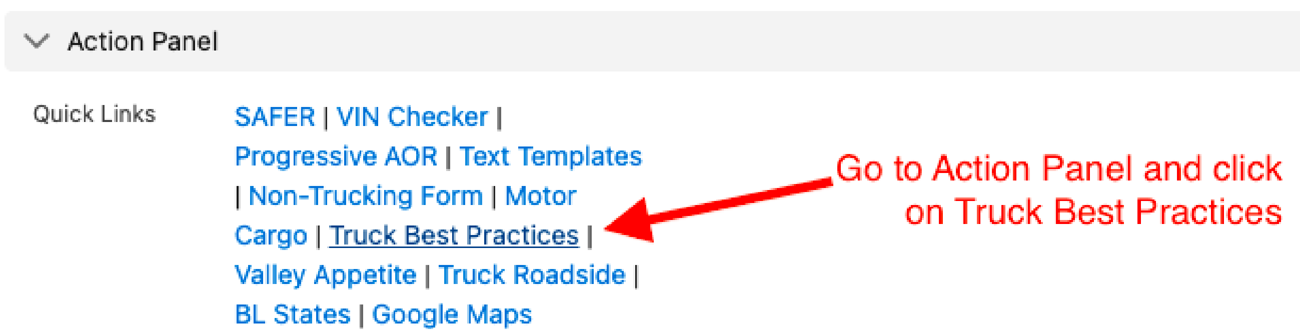
- Each rep has their own unique dedicated fax number. You will receive an email when the fax is received.
- Backup: The client can fax to our main corporate fax number **(877) 541-9199** and Mike or Liz will forward the fax email to you.

Transfering Calls

- From time to time you will answer a call from a lead or customer trying to reach one of our other WeShop Reps. Our phone system allows you to “warm transfer” the call directly to another rep or to a company Service Center.
- Watch “Transfer Call” Video 🎥

Access Truck Best Practices

- From time to time you will need to refer back to your training. You can access the Training Modules from any record in Salesforce by going to the Action Panel and clicking on Truck Best Practices. This document is password protected so Mike will provide the current password at the end of training.



Go to Action Panel and click on Truck Best Practices

Enter password and click on pdf to view training Modules

Resources - Contact Info

- **Service (Casey)**
  - Phone: ext 104 or (509) 790-0102
  - Fax: (509) 866-5172
  - Email: COI@weshop10.com
- **Progressive**
  - Agency Support: (877) 776-2436
  - Agent Fax: (800) 556-0014
  - Client Support: (800) 876-5581
  - Client Support: (888) 505-5250 (Spanish)
  - Jim McGrath: (602) 369-1343; james_mcgrath@progressive.com
- **Berkshire Hathaway**
  - Client Support: (877) 680-2442
  - Richard ‘Rick’ Hoffert: (480) 549-0738