

INTRODUCING THE AGENCY CONSULTING GROUP, INC. PROSPECTING SUITE ©

One of an agency's greatest struggles is to determine how many, and what size prospects are right for its producers, and projecting the goals of prospecting. Agency Consulting Group is pleased to introduce The Prospecting Suite. The Prospecting Suite helps agents and producers define the appropriate size accounts that will adequately sponsor a producer's time, the number of prospects that a producer may pursue during the year and the NB target goal and revenue projection resulting from prospecting. The Prospecting Suite is the right program to enhance producer's follow up if a marketing program is pursued instead of a simply solicitation letter and/or visit.

The PROSPECTING SUITE is comprised of a data entry page with only 21 questions and three sets of calculations that may be used together or separately. The product permits maximum flexibility to create numerous 'What If' scenarios from within each tool and the template may be replicated for as many producers as the agency may have, but is limited to use by the purchasing agency only during the licensing period.

This product can be purchased now through an annual or unlimited use software product. The annual PROSPECTING SUITE costs \$500 and the Platinum Version which has permanent with annual updates is available for only \$1,000. Both can be purchased through our website and payment via [PayPal](#). This program, like all Agency Consulting Group, Inc. products (excluding Agency Valuations), is available at **no cost only** those current clients that have had on site consultation services within the last six months.

HOW TO USE THE PROSPECTING SUITE

Data Entry Page – Answering 21 simple questions about the producer and the agency will automatically populate each of the three critical sections to provide you real-time answers to the important questions about prospecting for your producers.

1. **The Prospect Calculator** – This software defines the minimum size (premium and commission) of prospects that are suitable for an agency’s producers. The basis of size for potential prospects is a combination of producer expense and the length and duration of the marketing efforts generated by the agency. While the Prospect Calculator may be used independently for any producer and marketing efforts of any length and duration, it fits perfectly in Agency Consulting Group, Inc.’s Producer Validation tool and the 15-Step Marketing Program featured in the Asset Protection Model of Relationship Selling.

AGENCY CONSULTING GROUP, INC.		PROSPECT PREMIUM CALCULATOR		
	Producer Name	Sample Producer		
	\$250,000	Producer gross commission for agency		20.0%
Producer Compensation	\$50,000	Last Year's compensation (for production)		\$60,000
				Avg Comm to Producer
				Current Year Annual projected compensation
Visits/yr	4	# of personal visits /yr expected by the producer to each prospect		
Avg Visit Duration	1.5	hours incl travel per visit		
Program Years	3	how many yrs the agency will market to the prospect		
Avg Comm Rate	12%	historical or projected avg comm rate		
Min Prem Size	\$15,625	Annual Premium requirement for prospect accounts to maintain compensation level above		\$18,750
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<i>This worksheet calculates the size requirement of a prospect based on a producer's compensation requirement, the frequency and duration of prospect calls and the length of the marketing effort to prospects for the agency</i>				

2. **The PPT (Producer Prospecting Time)** defines how much prospecting time a producer logically has in a year (and by week) based on how many clients the producer services, the frequency of client contacts and other user-defined variables (i.e. # of days available

for sales calls). The results are displayed in terms of the producer's need for client visit time and the producer's availability for Prospect Calls. This spreadsheet solution may also be used independently, but fits into Agency Consulting Group, Inc.'s Producer Validation tool and the 15-Step Marketing Program featured in the Asset Protection Model of Relationship Selling.

PRODUCER PROSPECTING TIME (PPT)			
<i>Based on Client Sales Call Load</i>			
<i>This spreadsheet identifies the number of sales calls available to the producer for prospecting calls based on the number of pre-existing accounts requiring regular attention (Client Sales Calls) -- bordered cells may be altered</i>			
PRODUCER ACTIVITY			
<i>Sample Producer</i>	<i>Producer Name- Transfers from Prospect Calculator or Enter Name</i>		
250	<i>Total # of Commercial Accounts</i>		
100	<i># of Commercial Accounts under</i>	\$1,000	<i>Commission - Defined Small Accounts</i>
	<i>Ann'l activ (see def, below)</i>	<i>Ann'l Sales Call Requirement</i>	<i>See definitions, below</i>
<i>Accounts</i>			
20	3	60	Top (VIP) Accounts (for the producer)
130	2	260	Intermediate Accounts over minimum commission (above) to visit
100	0	0	Defined "small" accounts (above)
<i>Annual Activity represents the number of personal visits for maintenance and building of relationships (not phone calls) expected to be made in a year for that class of clients</i>			
<i>Sales Call Activity Schedule</i>	<i>Average</i>	<i>For Existing Clients and/or for Prospects</i>	
<i>SC / Day</i>	4	# of SC expected per day	
<i>Days/Wk</i>	3	# days devoted to client/prospect visits	
<i>Wks/yr</i>	50	working weeks in the year	
<i>Total # Sales Calls</i>	600	Expected to be made annually by the producer	
<i>Weekly SC Activity</i>	12		
<i>Sales Call Visits to Existing Clients</i>			
<i>Top Clients visits/wk</i>	1		
<i>Intermediate Clients visits/wk</i>	5		
<i>Balance of Clients visits/wk</i>	0		
Available # of Prospect Calls			
Prospect Calls/wk	8.2	for agents visitng Top and Intermediate clients	
		<i>From Data Entry PRP Qu. 2 and PRP cells C10-C12</i>	
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3. The **PRP (Prospect Revenue Generator)** either uses the data created in the Prospect Calculator and the PPT or uses your own entered data to project a) the maximum number of prospects a producer can manage in a year, the number of accounts that will be written by active prospecting in each year of your marketing program and the NB and Total Annualized Agency Revenue that will be generated if the marketing plan and prospecting calls are successful.

PROSPECT REVENUE PROJECTOR				
<i>Note: bordered cells may be altered to form 'What If' scenarios</i>				
Producer Name:				
Sample Producer	Transferred from PPT tab or enter name			
The PRP will help you define the projections for NB accounts and revenue generated by sequenced prospecting sales calls as a part of your marketing plan. The data is derived from the PPT and Prospect Calculator or can be manually entered in any bordered cells, below.				
<i>Enter 'Yes' in one cell only (below)</i>				
Is the Producer expected to visit his existing clients?	ALL CLIENTS	0		
	VIP CLIENTS only	0		
	VIP and Intermediate Clients	Yes		
Available # of Prospect Calls (from PPT Grid)	8.2	From PPT based on response, above		
Projected # of prospecting weeks/yr (from PPT Line 20)	50	From PPT		
Required # of Sales Calls/Prospect/yr	4	From Prospect Calculator c8 or enter data here	3	
Maximum # of Prospects	137	The number of on-going prospects needed		
<i>Please insert (below) the expected closing percentage of the total # of prospects (cell B14) if the producer follows the agency Marketing Plan prospecting guidelines (# of calls/yr for the requisite # of years in the Marketing Plan.</i>				
<i>Please complete Prospect Calculator to obtain Commission Income Projections.</i>				
	Closing Rates	# NB Accounts	NB Min Gross Annual Commission Income	
Yr 1 Projected Closing %	15%	21	\$46,125	First Yr Commission
Yr 2 Projected Closing %	15%	21	\$46,125	First Yr Commission
Yr 3 Projected Closing %	20%	27	\$61,500	First Yr Commission
Total Closings During Marketing Campaign		68	\$64,063	First Yr Commission
	Renewal Commission @ 90% Retention		\$120,386	over the 3 years
	Total Program 3-Yr Commission Income		\$184,449	