



SALES MANAGEMENT PROGRAM OVERVIEW

This two-year program is designed to provide consultative sales management support for your sales managers in an effort to increase your overall business and help your sales team reach its full potential. Participants can expect improved clarity around sales goals and procedures, increased results and a stronger sales team moving forward. The program is meant to be collaborative, with frequent communication and regular progress checks. Ideal customers have a sales manager with at least two salespeople, have been appointed for at least one year and are growing with USLI.

LEADERSHIP WITH HEART GUIDING PRINCIPLES

We use our Leadership With Heart principles to guide our decision-making, and you can expect to see these values and practices in action as we work with you.

- ▶ Convert and lead by example
- ▶ Reach deep and share the story
Stand in their shoes
- ▶ Show a full range of emotion
- ▶ Avoid reactionary or emotional decision-making
- ▶ Coaching is celebrating and correcting every day
- ▶ Create a team environment where people want to work as opposed to making them work
- ▶ Don't minimize the 95% because of the 5%
- ▶ Accept and embrace 100% responsibility and accountability 100% of the time
- ▶ Daily self-examination
- ▶ Always do what's right

FUNDAMENTAL PRINCIPLES OF SELLING

We believe a multifaceted strategy and a high volume of sales activities produce positive results. Attitude and coachability are paramount, and all salespeople can benefit from structure and good coaching. A disciplined approach creates a pathway for success and prepares us to sustain unforeseen obstacles personally and professionally. Our Fundamental Principles of Selling are the foundation of our sales culture.

- ▶ Preparation and product knowledge are the foundation
- ▶ Time management and accountability
- ▶ Refine your organizational skills
- ▶ Give 100%, 100% of the time!
- ▶ Communicate and actively listen
- ▶ Attitude and perseverance
- ▶ Be self-motivated with a great sense of urgency
- ▶ Building and sustaining relationships
- ▶ Daily self-examination

EXPECTATIONS

- ▶ Open communication and collaboration
- ▶ A sincere commitment to improve sales disciplines and change bad habits within your team
- ▶ Willingness to take corrective action with those who are not meeting minimum expectations
- ▶ Defined sales activities
- ▶ Quantifiable sales benchmarks



WHAT IT LOOKS LIKE

Pre-brief: We meet with your leadership team to establish clear goals and expectations, which will become part of our Letter of Agreement.

Launch: A launch meeting will take place the first month. During this meeting, your dedicated USLI sales manager visits your office to help launch our collaborative effort with your sales manager.

One-on-one meetings with the sales manager (biweekly): We will have one-on-one consultations with you and assist you in facilitating regular one-on-ones with your salespeople.

Team meetings (monthly): We will assist you in facilitating regular sales meetings for the team to build morale, increase communication and share successes and challenges.

Reporting (weekly): We expect salespeople to keep score and report activity weekly. We will assist you in managing this discipline and ask that you share results with us so we're all in the know and can coach and adjust course as necessary.

Progress checks (quarterly): We will conduct quarterly progress checks with you to provide written feedback, assess goals and results and adjust plans as needed.

Training (ongoing): You and your team will benefit from sales training through USLI University throughout the year.

WHAT OUR CUSTOMERS ARE SAYING

The USLI Sales Management Program is a "best kept secret." Training, coaching, goal-setting, consistency and accountability are all part of the program. Looking to hire Producers? Want to make your Producers better? Need coaching for your Sales Managers? The USLI team is there to help you every step of the way. They work at one-on-one coaching with each participant including call shadowing, bi-weekly check-ins and more. With all of this, there is no overarching goal to only offer or push USLI products. It's been a fantastic experience, and we'd do it all over again without hesitation!

– Cary Iaccino, Vice President of Production, Gaspar Insurance Services, Inc.

The USLI Sales Management program is providing our agency with great structure and accountability for both management and producers. With the continued focus on sales activities, it is enhancing our agency-wide sales management processes and reinforcing the need with our more senior and established producers. Additionally, it is expediting the learning curve and giving our newer producers more confidence to talk to prospects and our clients.

– Matthew M. McGrail, Senior Vice President, Meadowbrook Insurance Agency