

# Putting Together an Idea Sharing Group

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additional people to join our group. As additional members joined our group, they introduced fresh perspectives and presented new ideas for ways to run our offices and for producing new business. As word about our club got out, many of the best agents in the area sought us out. We had members join who were the top agents in our area for life insurance, auto insurance, business insurance, etc. This made the group even more inviting to other Allstate agents in our area. It was truly amazing how word spread about our lunch group and how desirable it was to join.

Aside from the business knowledge acquired at our meetings, perhaps the most significant other benefit has been the opportunity to meet and develop lasting friendships with fellow Allstate agents. Our meetings help break down the walls that separate agents from communicating and fraternizing with each other. Back in the day, the company held regular meetings where agents got to know each other. Since the demise of regular company meetings, there has been no impetus for agents to get together as a group. Until an agent, or a group of agents, takes the initiative to start a lunch or breakfast group in your area, it will not happen. It is sad to say, but many agents do not know most of the other agents in their markets.

As our group grew larger, we had to find bigger and better places to meet. In order to have a proper meeting for a large group, it is essential that the meeting environment be conducive to the size and needs of the group. It is crucial, for example, that distractions, such as noise, be kept to a minimum. Members should be able to speak without shouting and hear without straining.

We have found that the ideal meeting place for a larger group is either a country club which can give you a private area, or

When we first came up with the idea to get a group of Allstate agents together to share ideas on how we run our offices, prospect for clients, cross-sell products, and all other things necessary to be an Allstate agency owner, we started with a group of five agents whose offices were in close proximity. Starting out this way made it easy because we all knew and trusted each other. We decided that the easiest way to meet on a regular monthly basis was to meet over lunch, since we all had to eat lunch anyway. We all looked at the time away from our offices as a welcome break. Getting away from your office for a couple hours a month helps keep your sanity.

When we met for those first meetings, we openly shared what we were doing in our offices and compared notes. Initially,

the original emphasis of our group was to increase the financial production of our agencies. At the time, if you sold a certain level, you doubled your agency bonus. After a few meetings, the scope of our conversations expanded to include a host of other agency related business topics. The purpose of the group evolved into sharing ways to help each other become more successful in our individual agencies. We discussed what steps we took to hire our staff and how we paid them. We talked about the various processes we used to track the work of our staff and how we could best utilize that information to develop incentive bonuses, create new work flow processes and maximize cross selling opportunities.

As time went on, various members of the group asked if they could invite

a restaurant that has private rooms. You can also hold your meetings at a hotel that has private rooms and is willing to serve you off of the hotel's regular restaurant menu. With larger groups, to keep it simple, we divide the total bill by the number of attendees and add a respectable tip so that the restaurant, country club or other facility will remember us and go out of their way to set up private areas for us for future meetings.

Our group has progressed to the point where we now have guest speakers or sponsors at many of our meetings. There are times when the guest speaker is also a sponsor. Meeting sponsors can help defray costs by providing the meeting room, if there is a charge, or by paying for lunch. When we do not have a guest speaker or a sponsor, we usually allow the attendees an opportunity to introduce themselves. They tell the group where their office is located, and how long they have been with Allstate. Then they have a chance to discuss what they are currently doing, trying to do or getting ready to do in order to grow their agencies. They can also bring up questions that they want the group to discuss, such as "How do you go about hiring new staff?" or "What is the best way to pay your staff?" or "How much are the rest of you paying your staff?" or "What media gets the best results for advertising?" or "Do the sample quote mailers work well?" This has become a great forum for discussing everything Allstate.

In order to get everyone to open up, we do not encourage managers to attend the meetings. However, since we have nothing to hide, any manager who would like to attend is welcome and is treated the same as everyone else in the room. Sometimes, this can be an asset to the group because a manager can relay ideas that have worked for agents in their markets. In addition, they often have more insight into other things that may be going on with Allstate or they may know some tricks that can make our jobs easier. This added input, of course, benefits everyone.

Because our group has now grown to 85 members, we send out an email meeting announcement three to four weeks ahead of time. The email asks members

if they plan to attend the meeting. Then, three to four days before the meeting, I have two of my staff members call every member who has not responded and find out if they plan to attend. This is important because the meeting facility needs an accurate head count so it can set up enough tables and chairs for the meeting.

Guest speakers and sponsors can add an important element to your meetings. Our group has utilized a variety of them since we started out. Following are some of the kinds of speakers or sponsors, or a combination thereof, who are generally open to participating:

- **Fund Representatives:** We have had as guest speakers/sponsors, representatives from the various different funds that we represent through our variable products. They can give you a great insight into their products and give you sales tools that will help entice your clients into talking with your life specialist. We have all found that the more you know about a product, and the competing products, the easier it is to make sales.

- **Representatives from Approved Companies:** We have had as guest speakers/sponsors, representatives from Health Plan Services, an Allstate approved company located in our area. We are licensed with them to sell individual and group health products. This is an important product if you intend to sell the Allstate Workplace Division (AWD) SHOP policies. We have also had representatives from AWD as guest speakers/sponsors to discuss the SHOP policies, the accident policies and the cancer policies.

- **Politicians:** Our guest speakers have also included state senators and state representatives. We have also had our state legal counsel / lobbyist speak to our group. In short, once the group gets larger, it is easy to have quality speakers come and talk to the group.

- **Others:** In addition to the list above, there are plenty of other vendors or sponsors who would like to get in front of a group of Allstate agents. Allstate approved vendors, for example, can help your group understand some of their processes and the reasons for them. We have had glass companies, body shops, water mitigation companies, windstorm mitigation inspection companies, medi-

cal inspection companies and many, many more.

I have found that the main key to launching, maintaining and growing your group is based on how interesting you make your meetings. It is also important to make one person responsible for taking meeting notes. The notes should then be typed up and distributed to all of the members in your group, whether they attended the meeting or not. This brings added value to your meetings. It is also especially helpful when group members discuss things they are doing in their agencies. There are many instances when these notes and any supporting documents need to be seen in order for the whole group to understand the concepts being discussed. In addition, it is very important that you send out those documents in a timely fashion to everyone in the group.

Lastly, to make your group work, you'll need some responsible group leaders. You should have a primary leader and, depending on the size of your group, one or more back up leaders to assist in coordinating your meetings and to act as a stand-in should the primary leader be unavailable. The responsibilities of this group include securing meeting locations, moving the meeting location from time to time in order to make travel to the meetings fair for everyone, emailing or sending out meeting notices, and making follow up calls to members who don't respond. Most importantly, these individuals must be able to MC the meetings, keep them flowing smoothly and prevent them from turning into a bitch sessions.

There is obviously more I could tell you about our group, but if you take the information I have presented in this article, you should be able to start a group of your own. I can tell you this, once you get started, you'll be amazed at the results. Believe it or not, agents are hungry for new ideas and fellowship. Give it a try... you'll wonder why you didn't do it sooner.

*If you are interested in starting a lunch or breakfast group and would like to speak to me for assistance, you can reach me at (954) 755-1177, at [StevenMarcus@Allstate.com](mailto:StevenMarcus@Allstate.com), or at [StevenMarcus@StevenMMarcus.com](mailto:StevenMarcus@StevenMMarcus.com).*