



Agency Concierge

# Workflow Realignment Case Study

Think about what a typical agent does every day: sales calls and meetings, quotes, claims, paper processing, carrier questions, etc. One major cost to an agency is how much time an agent spends **not selling**.

A way to lessen that loss and increase revenue for your agency is to realign some basic customer service tasks, such as quoting, claims or carrier questions.

Let's work through an example.

## A Typical Day

Say a typical agent earns about \$250,000 in commissions a year, equivalent to about \$20,000 a month or \$143 an hour. A breakdown of his day probably looks like this.

Activity	Actual Percent of Time
Sales Calls and Meetings	50%
Paper Processing	15%
Claims and Carrier Questions	25%
Quoting and Presentations	15%

In this scenario, he is earning \$143 an hour which includes performing the non-sales activities. Imagine what would happen if you realigned a majority of his non-sales activities and freed up a third of his day.

## An Ideal Day

By partnering with Agency Concierge to handle most of the back office tasks, your agent can spend 85%, an increase of 35%, of their time on sales. This scenario allows about

Activity	Ideal Percent of Time
Sales Calls and Meetings	85%
Paper Processing	5%
Claims and Carrier Questions	5%
Quoting and Presentations	5%

51 hours a month to work on more leads and complete more sales. By upping his sales time the agency brings in roughly \$7,000 more in commissions each month, increasing total commissions to \$27,000 a month or \$337,500 a year.

**Yearly commissions grow \$87,500**





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# Workflow Realignment Worksheet

## Your Day

So now let's work through your typical and ideal days. How can Agency Concierge help you?

Activity	Ideal Percent of Time	Actual Percent of Time
Sales Calls and Meetings		
Paper Processing		
Claims and Carrier Questions		
Quoting and Presentations		

**Call us at (517) 351-4908**  
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