



We are an independent insurance agency that provides personal, commercial, and life insurance products for our clients. Our agency consists of 3 full-time customer service agents, a part-time admin assistant, a part-time commercial/life agent, and myself as the owner/office manager. We have been working with ScoreCard for a year. In particular, I needed help transforming my CSA's from an "order taking" style of sales to a more purposeful, conversational form of communication. They have been taught the proper way to get to know the customer using "Discovery Questions". They have learned various ways to overcome sales objections, scheduling sales appointments to present quotations, and ultimately asking for the sale and closing it. The structure and knowledge have given them more confidence. Their bi-monthly ScoreCard meetings assist them with personal development using the tools provided, setting goals and being held accountable. Janelle has done an excellent job developing a relationship with both of the agents that are participating in the program. She draws on their strengths and presents ideas and solutions that are very specific to each person's style to better help them achieve their goals.

ScoreCard took us back to the basics to build a strong foundation and create good habits. We had a challenging year finding the right new employees to become part of our team. It was disruptive and it felt like we were always taking one step forward and two steps back. New business production was slow the first half of 2022, however the 2nd half picked up. Many of our older clients took advantage of the skyrocketing home prices, sold their homes and relocated to other states. New business is looking up as the home sales settle down and finally, car dealers have cars to sell. The team has developed excellent upselling and cross selling techniques. They are knowledgeable advisors and are excited to take the time to share that with our clients.

The ScoreCard Daily Activity log tracks how the employees are spending their time. It is very easy to use and the data is presented in a very user friendly format. It concentrates on the important sales-oriented tasks that the employee should focus on. The structure of the Daily Huddles and weekly sales meetings have really improved our team communication, expectations, and making sure everyone is on the same page. Aaron has been instrumental in improving my time management, and teaching me to focus on what is important and measurable. In my meetings with Aaron & Janelle we address our agency's successes, as well as challenges and work together to develop a plan. Janelle provides additional input based on her training sessions with my other team members. That provides excellent insight to see what's working, or if there are issues, what modifications could be made to improve our results.

Now that we finally have the right team members onboard, I am really looking forward to seeing how far ScoreCard will take us this year!

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