

Available Resources



When you affiliate with Leavitt Group, the following list of resources are available to your agency. These support services are designed to help you succeed and focus on what you do best—sell insurance. Many of these valuable options are covered by your Leavitt Group Agency Association (LGAA) fees, while others are available at an additional cost.

PRODUCER DEVELOPMENT (P&C AND EB)

- ▶ Producer Development Plans P&C/EB paired with Monthly Coaching Calls with SFDG
- ▶ Business Plans
- ▶ Leavitt Producer School
- ▶ How to Use Vital Signs to Monitor Producer Progress
- ▶ CRM Dynamics 365 Sales Hub
- ▶ CRM Dynamics 365 Sales Hub List Import Training
- ▶ CRM Dynamics 365 Sales Hub Mobile APP Training
- ▶ CRM Dynamics 365 Sales Hub Premium
- ▶ CRM Dynamics 365 Sales Hub Strategic Prospecting
- ▶ CRM Dynamics 365 Sales Hub/CSR/Sales Manager/Co-Owner or Agency Training
- ▶ How to Strategically Use the CRM Dynamics 365 Sales Hub
- ▶ miEdge P&C and EB
- ▶ P&C Content Cloud (Zywave)
- ▶ ZoomInfo
- ▶ Insurance Xdate
- ▶ CAB
- ▶ SalesGenie
- ▶ Cold-Calling Training
- ▶ Sales Process Training (Roadmap to Success)
- ▶ Workers Compensation 1.0
- ▶ Workers Compensation Strategies/2.0
- ▶ ModMaster

- ▶ NAICS Tool Training
- ▶ LinkedIn Training
- ▶ Service Timeline
- ▶ ReferenceConnect (RefCon)
- ▶ TotalCSR
- ▶ Risk Management New
- ▶ Business Strategy
- ▶ Risk Management Renewal Business Strategy
- ▶ Risk Management Champion Training
- ▶ Risk Management Client-Onboarding Services
- ▶ Risk Management Demos Prospects/Clients
- ▶ Risk Management On-site Loss Control

OTHER RESOURCES

- ▶ Sales Leader Development
- ▶ PacWest
- ▶ APPS
- ▶ CL Central
- ▶ PL Central
- ▶ Practice Groups
- ▶ AMS 360 Training
- ▶ Broker Briefcase
- ▶ Carrier Schools
- ▶ Wholesale
- ▶ Select Wholesaler Initiative
- ▶ How to use Bank Credit Ratings
- ▶ Allegiance Premium Finance Company
- ▶ Leavitt Link
- ▶ Leavitt Life
- ▶ Patra and Patra Assist

SALES COMPETITION PARTICIPATION

- ▶ Surges
- ▶ Risk The Game (EB and P&C)
- ▶ The Game (Personal Lines)

MARKETING/MEDIA

- ▶ Producer and Agency Marketing Plan
- ▶ Eloqua and Podium - Marketing Automation Tools
- ▶ Social Media
- ▶ SEO
- ▶ Personal and Team Photos
- ▶ Producer and Client Testimonial Videos
- ▶ Agency Marketing Partner (AMP)
- ▶ Graphic Design
- ▶ Website Update and Changes
- ▶ Blog, News, Articles, and Content
- ▶ Public Relations (PR)

EMPLOYEE BENEFITS

- ▶ Producer and Agency Marketing Plan
- ▶ Ease
- ▶ Employee Navigator
- ▶ Flock (Paychex)
- ▶ HealthJoy
- ▶ HR Service
- ▶ Strive
- ▶ ZoomInfo
- ▶ miEdge
- ▶ BoostHR
- ▶ RMC HR Essentials
- ▶ NBS
- ▶ OneEleven
- ▶ Compliance Dashboard
- ▶ Broker Briefcase Rebranded to EB Content
- ▶ Benefit Point
- ▶ Benefit Point Training
- ▶ Benefit Point - Benchmarking
- ▶ Benefix
- ▶ Fisher Phillips
- ▶ Leavitt Advantage
- ▶ Employee Benefit
- ▶ Technology Consultation
- ▶ Wrangle 5500
- ▶ ZyWave
- ▶ Voluntary Benefits Assistance

RETIREMENT RESOURCES

- ▶ Group Retirement Plans
- ▶ Additional group Retirement Plan
- ▶ Financial Wellness

PRODUCTS

- ▶ Producer and Agency Marketing Plan
- ▶ Agency Zoom
- ▶ DocuSign
- ▶ PL Rating
- ▶ Mobile App
- ▶ Insurlink (Client Portal)
- ▶ Prevail Network
- ▶ Commercial Submission
- ▶ ePay Policy

AGENCY PARTNER BENEFITS

- ▶ Producer Pathway to Validation
- ▶ Promote and Nurture Agency Culture
- ▶ Strategic Planning - SWOT Analysis
- ▶ Strategic Planning - Strategic Plan
- ▶ Financial Consulting - Benchmarking
- ▶ Financial Consulting - Capital Planning
- ▶ Financial Consulting - Cash Flow Management
- ▶ Financial Consulting - Budgeting
- ▶ Financial Consulting - Forecasting
- ▶ Financial Consulting - Lease Assessment
- ▶ Production and Sales - 80/20 Implementation
- ▶ Production and Sales - Sales Meeting Training
- ▶ Production and Sales - Producer Investment
- ▶ Employee Assessment - Employee Efficiency Analysis
- ▶ Employee Assessment - Workload Structures
- ▶ Employee Assessment - Recruitment
- ▶ Employee Assessment - Small Business Plans
- ▶ Perpetuation - Perpetuation Planning
- ▶ Perpetuation - Perpetuation Process
- ▶ Perpetuation - Valuations
- ▶ Perpetuation - Stock Transfers
- ▶ Agency Mergers & Acquisitions