

The Agency Sales Growth Blueprint



The 7-Step System Top Agencies Use to Turn Potential into Performance — and Scale Growth on Purpose

You Don't Have a Sales Problem.

You Have a Sales System Problem.

- Your producers are winging it.
- Your pipeline's inconsistent.
- Your "sales process" is just quoting and hoping.
- And your CRM? A graveyard for deals that didn't close.

This isn't how you grow.

The Hard Truth:

Top producers don't win because they're charming.

They win because they run a system.

A process that turns: Activity → Appointments → Clients → Revenue.

This Blueprint Gives You That System:

7 steps. 7 controls. 7 growth drivers.

- Miss one? Growth stalls.
- Nail them? Growth scales.

Inside This Blueprint:

- Build a pipeline that feeds you forever.
- Run a sales process that makes the incumbent irrelevant.
- Deliver retention that locks clients in for life.
- Run a scoreboard that drives accountability — without babysitting.

Bottom Line:

Stop winging it.

Stop quoting and hoping.

Start winning — on purpose.

Open it. Use it. Start fixing it today.



STEP 1: Revenue Goals That Actually Mean Something

If your producers don't know how much new business they need... they're guessing. And if they're guessing, you're managing chaos — not growth.

This is why pipelines stall, targets get missed, and producers stay inconsistent. The problem isn't effort — it's clarity.

Most producers don't know how big their book should be, how much revenue they need, or how that breaks into accounts, appointments, and prospecting.

This is why growth feels random. Why motivation fades. And why coaching feels like pushing rope.

The truth? Most underestimate what it actually takes. Once they calculate the real cost of life — retirement, college, weddings, cars, freedom — their savings number is way bigger than they expected.

When they see that number, everything shifts. The goal isn't "do my best" anymore — it's a concrete, measurable target that drives action.

Your job is to help them own that number — for themselves.

The math is simple:

- Revenue goal ÷ avg. account = new accounts needed
- New accounts ÷ close rate = appointments needed
- Appointments ÷ contact-to-appointment rate = prospecting needed

This replaces guessing with clarity.

From there, pipeline meetings are about progress against the math — not gut feelings. If a producer can't answer how much revenue they need, how many accounts that is, or how many appointments they're setting... they're not running a process.

When the pipeline doesn't match the math, growth isn't happening.

Miss this step — and the rest doesn't matter.



STEP 2: Differentiate — Or Compete on Price Forever

If your producers can't make the buyer believe there's a clear reason to change...
The incumbent keeps the account.
It's that simple.

The Reality:

Most producers walk into meetings sounding just like every other agent the buyer has ever met:

"We'll give you great service."

"We'll shop the market."

"We'll get you the best price."

The buyer's heard it all before. They're numb to it.

And if your producers don't stand out?

Price becomes the only differentiator.

Your Job as the Sales Leader:

Teach your producers how to lead a sales conversation that exposes the gaps between the buyer's current experience and what your agency actually delivers.

This isn't about bashing the incumbent.

It's about helping the buyer realize they're settling—without even knowing it.

The Play:

- Lead the buyer to see risks they didn't know they had.
- Show where the incumbent is reactive, not proactive.
- Highlight gaps in communication, service, or risk management strategy.
- Make the conversation about solving business problems—not selling policies.

Your producers must shift the buyer's mindset from:

"We're fine with our current agent..."

to

"We're exposed, and I didn't realize it until now."



Differentiate — Or Compete on Price Forever Continued

What You Should Be Asking Your Producers:

- What's the specific risk or service gap you're highlighting for this prospect?
- What questions will you ask to make the buyer rethink their current agent?
- How are you positioning our agency as a business partner—not just another quote?

Bottom Line:

If your producers can't create doubt about the incumbent... they don't have a shot.

Differentiation isn't a talking point.

It's the trigger that makes a buyer move.

Nail this... or get ready to quote and lose.

STEP 3: No Pipeline. No Revenue.

If your producers don't have a real pipeline, growth isn't possible.

Referrals aren't a pipeline. Waiting isn't a strategy. Hoping isn't a plan.

A real pipeline is intentional. It's built to match the revenue goals from Step 1.

Every name on that list must be qualified — accounts that fit financially, where you know the buyer, and have contact info ready.

If not? It's not a prospect. It's noise.

Your producers need two lists:

- A Prospect List of at least 200 qualified companies.
- A Target 20 — the dream accounts worth focused, relentless effort.

The mistake most producers make?

They stop after building a list.

But a list isn't a pipeline.

A pipeline is a list in motion.

Worked daily.

Measured weekly.



No Pipeline. No Revenue. Continued

When the pipeline is right, activity flows... Appointments happen... Revenue follows.

When it's wrong — too small, unqualified, or ignored — failure isn't a surprise. It's inevitable.

No pipeline. No revenue. Period.

STEP 4: Prepare to Win — Or Don't Show Up

If your producers walk into a meeting without a plan...

The incumbent wins by default.

Winging it is not a strategy. Showing up “hoping” it goes well is how you lose.

Winning producers walk in knowing:

- Who has the money now (the incumbent).
- Where the incumbent is weak.
- How to lead the buyer to see the gap.

This isn't guessing. It's a pre-call strategy.

They need a plan:

- What's the differentiation story for this account?
- What's broken that the buyer doesn't realize?
- What questions will force the buyer to rethink staying with their agent?
- How are we leading this meeting — not reacting to it?

No prep = no control. No control = no sale.

If your producer can't answer why the buyer should fire the incumbent before the meeting starts, they've already lost.

You either prepare to win — or you prepare to lose. There is no in between.



STEP 5: Run a Sales Process That Wins — Not One That Quotes and Hopes

Quoting is what producers do when they don't know how to sell.

It's what happens when there's no real process.

If the buyer doesn't fire the incumbent in their head during the meeting, the deal is dead.

Winning producers take control from the opening line. They show up with a purpose, set the tone, and shift the conversation away from products and pricing — toward risks, gaps, and outcomes.

The prospect needs to see:

- Where they're exposed.
- Where the incumbent is reactive.
- That staying with the incumbent costs more in risk than switching does in dollars.

When the buyer feels that? **Price disappears.**

The win condition isn't the quote.

It's the Broker of Record Letter.

If we're not talking BOR, why are we even meeting?

This is how you move from being a vendor to an advisor — and from quoting... to winning.

Control the meeting. Drive the outcome. Or lose. Simple.

STEP 6: Lock Them In — With a Retention System That Actually Works

Winning the deal isn't enough.

If your producers can't deliver a retention experience that matches the promises they made in the sale — you're vulnerable.

And guess what?



Lock Them In — With a Retention System That Actually Works Continued

“Call us if you need anything” is not a retention plan.

Clients stay when they feel served — proactively. Not reactively.

A Written Service Timeline is non-negotiable.

- This is your retention weapon.
- It's how you prove you're different — after the deal closes.

It's simple. You show the client:

- Here's exactly what happens, month by month.
- Here's how we manage risk, claims, renewals, and support.
- Here's what proactive actually looks like.

The payoff?

- Higher retention.
- More introductions.
- A defensible book that competitors can't touch.

Retention isn't a promise.

It's a process. Document it. Deliver it. Or lose.

STEP 7: Scoreboard or Drift.

When producers can't see the numbers, they drift. When leaders don't run the numbers, they lead on gut, not reality.

No scoreboard = no accountability. No accountability = no growth.

The scoreboard gives everyone visibility. When the numbers are on the table, there's no hiding, no confusion, and no surprises. You can immediately see where the process is breaking down:

- Is the pipeline big enough?
- Is activity where it needs to be?
- Are appointments converting?
- Is revenue tracking toward goal?



Scoreboard or Drift Continued

This is the power of running a real sales operation — not chasing personalities.

The workbook is crystal clear: There are 5 numbers that matter:

1. New suspects added.
2. Appointments set.
3. Opportunities created.
4. Wins (BORs signed).
5. Revenue written.

When these are visible, coaching becomes simple. You're no longer solving the wrong problem — you're solving the right problem.

If pipeline is thin, you coach prospecting.

If appointments aren't converting, you coach differentiation.

If wins are low, you coach sales process execution.

The scoreboard creates clarity. And clarity creates accountability.

This is how you shift from managing effort...

To managing outcomes.

This is the process. Bignition is the system.
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