

# SPECIAL REPORT

## SERVICE TEAMS

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You may have noticed that other agents make a big deal about their teams. On a recent \$100,000 account where I act as the consultant, I have proposals from two other agencies.

One agency touts the fact that they will have the following people handle this account:

- Account Executive
- Senior Vice President
- Account Manager
- Assistant Account Manager
- Claims Manager
- Carrier Marketing Manager

The other agency used the titles:

- Account Agent
- Account Executive
- Claims Specialist

These titles may work to allocate work within the agency, meaning that the agency is structuring its organization to serve its needs. However, I do not think that it will serve the needs of the client, nor do I think that it will impress a client.

I think that clients want to know one or two people maximum at an insurance firm, at least this is what I look for with lawyers, CPAs, doctors, banks, and so forth.

As a matter of fact, this is what I look for in dealing with insurance carriers. I just want to know someone to call who will answer the phone without the call being screened and will do something when promised, as promised, utilizing that person's expertise to serve my needs.

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