

# GRAND KNIGHTS LEADERSHIP SEMINAR 2018 -2019

Your Field Agent's Roles, Responsibilities and  
Expectations

# First...the numbers...

- Over \$109 Billion of life insurance in force.
- \$27.5 Billion Bond Portfolio of assets under management.
- 1,220,000 life insurance contracts in force.
- 40+ years of consecutive Superior ratings from A. M. Best Corporation.
- A Fortune 1000 company (#880).
- All time high \$8.78 Billion issued in 2017.
- 5 consecutive years recognized as “Most Ethical Company” by Ethisphere Institute.

# Just what does a Field Agent do?

1. Services existing Knights of Columbus policyholders to make sure what they own is up to date
2. Visits Associate members to see if we can find any areas that the Knights might be able to help with and fill in those voids
3. Maintain good fraternal relationships with his councils, members and clients

# Supreme Office Expectations

- Make 100% of his production quota for that calendar year
- “Turnover” at least 20 associate to insured – including new and existing members
- Provide personal “corner grocery store” type service to his existing policyholder base
- Do all this in an extremely ethical, moral and Christian manner

# Agency Expectations

- Run 10 appointments a week.
- Weekly accountability for his activity.
- Attend a monthly sales meeting.
- Continue on an educational career track for the FLC, FICF and CLU designations.
- Hit all Supreme Office expectations.
- Visit each assigned council once per quarter and more if possible.

# Agency Expectations

- Attend the State Convention.
- Contribute to the Benefits Advisor's Scholarship fund
- Attend the Columbus Day Ball.
- Attend all First Degrees if possible.
- Put on a Fraternal Benefits Night in each council.
- Make the Insurance Quota for your council.
- Finish the year in the top 25% of the company (out of 1350 company wide agents).

# The Process

- Typically it takes anywhere from 3-8 phone or email contacts to obtain one appointment.
- The initial visit is usually a getting to know you session where you get to know us and we learn about you to see if and how we can help you.
- The 2<sup>nd</sup> appointment is where we would show Knights of Columbus solutions.

# The Process

- The time from the first attempted contact to an initial appointment ranges from 1 – 3 weeks.
- The time from the first appointment to a possible sale is anywhere from 1-6 weeks.
- The underwriting process once an application is submitted is typically 3-4 weeks.
- This not a quick process....



# What counts as an Insurance member for Star Council

- Any Knights of Columbus product on the Member – who did not previously own one.
- Life insurance, Long Term Care, Annuities, Disability Income Insurance.
- Repeat or different products on the same member do not count.

# Creating the right environment

- Support starts at the beginning of your term as GK.
- He wants to have a good working relationship with you and the council – but has a huge time crunch.
- Call/email him when you need something or hear something you think he needs to know.

# Field Agent Time Crunch



The average agent has 4-5 councils.  
A council has 2 meetings a month.

With 20 work days in a month – this  
would mean 10 days just for meetings.

Even 5 meetings a month would impair  
his ability to do his job.

# Creating the Right Environment

- Support starts from the podium.
- Realizing how busy he is and communicating that to your council will help them understand his schedule.
- It's not that he doesn't want to go to your meetings – it's just that the system and structure doesn't allow for that with today's smaller councils.

# What to do if you have a problem?

- First, call the Agent.
- If you can't get satisfaction – call Bob Marlowe, Harry Canter or myself.
- We realize you don't want to “go over the agent's head”...but realize that we will handle the situation in a delicate manner that won't put you in a bad light – we're in this together!

# That being said...

- Invite your agent to membership drives...he's very good at recruiting members.
- Please set up a "Fraternal Benefits Night" – he would like to do this in the Fall or Spring.
- Our goal is to help you make Star Council.
- Make sure your membership/admissions team is giving a good recommendation about the insurance program...or they won't let him in...

# Thank You!!

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- Thanks for taking a leadership position.
- Thanks for the personal sacrifice you are making.
- Thanks for helping to expand the mission of Fr. McGivney.
- Thanks for helping to make the world a better place through KofC charitable efforts in the community.