

WITH AMANDA RICHARDS  
MONDAY NOVEMBER 9, 2020

# Daily Bite Size Training

Topic:  
Won/Lost Deals

# Won Deal

## For Agents:

- Assign Win
- Goal Management

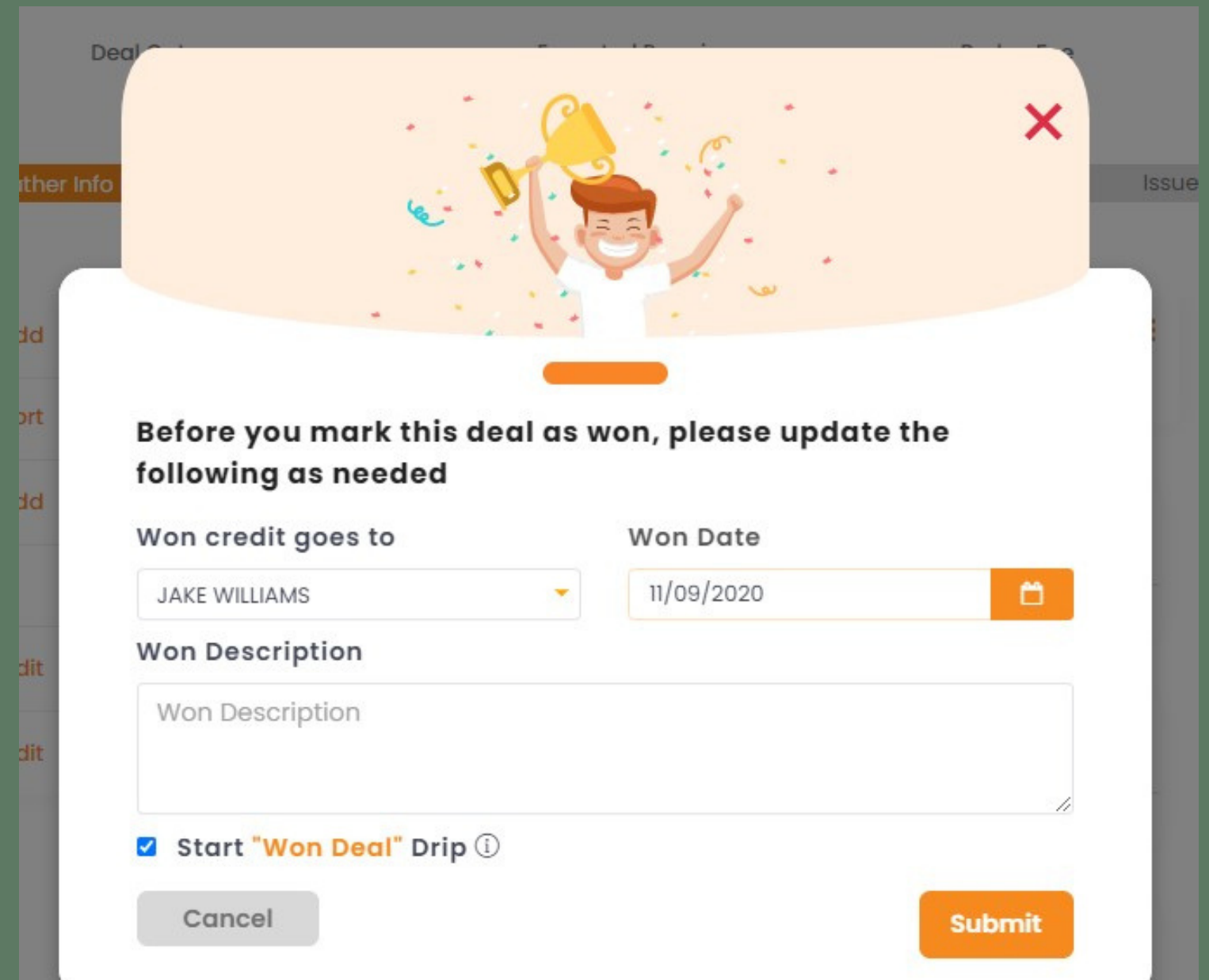
Description: Why did you win this deal?

Possibly reasons:

- Expertise
- Price
- Proactive

## For Customer:

- Welcome Campaign
- Cross Sell Opportunity



Deal

Other Info

Issue

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Before you mark this deal as won, please update the following as needed

Won credit goes to

Won Date

JAKE WILLIAMS

11/09/2020

Won Description

Won Description

Start "Won Deal" Drip ⓘ

Cancel

Submit

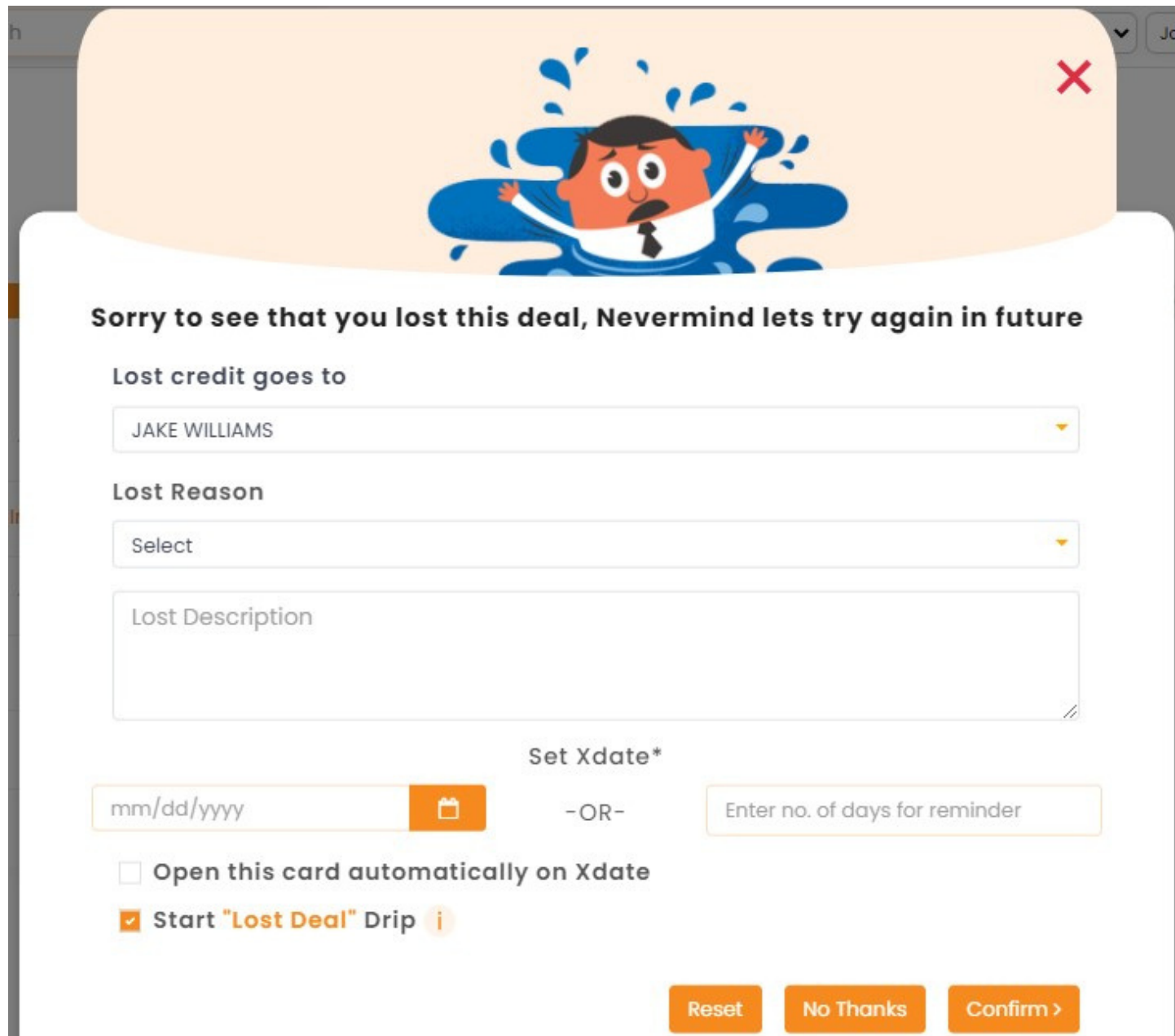
# Lost Deal

## For Agent:

- Select Lost Reason
- Fill out Lost Description
- Set X Date

## For Customer:

- Do not wait an entire year to reach out
- Start Lost Deal Drip for consistent communication



Sorry to see that you lost this deal, Nevermind lets try again in future

Lost credit goes to  
JAKE WILLIAMS

Lost Reason  
Select

Lost Description

Set Xdate\*

mm/dd/yyyy -OR- Enter no. of days for reminder

Open this card automatically on Xdate

Start "Lost Deal" Drip

Reset No Thanks Confirm >

# THANK YOU!

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