



MORE THAN JUST A POLICY JACKET

Knowing and Projecting Your Agency Value

Course Description:

Let's face it—every agency offers quotes, discounts, and coverage. But when a client says, "You're more expensive," what do you say next?

More Than Just a Policy Jacket is a high-energy, highly practical session designed to help insurance agency owners and their teams define, deliver, and defend their unique value—beyond just price or product.

Packed with real-world agency examples, this course helps you shift the sales conversation from cost to worth—by teaching your team how to articulate what truly makes your agency different, and how to showcase value in ways your competitors can't match.

From the "Give Me 10" challenge to a deep dive into the power of *lagniappe* (a little something extra), this session gets agency teams thinking creatively, selling more confidently, and retaining clients more effectively.

Why Insurance Agencies Need This Course:

- Transforms the "you're more expensive" objection into an opportunity
- Helps every team member build a personal list of differentiators they can use in real conversations
- Shifts your team's mindset from quoting policies to delivering unforgettable experiences
- Provides low-cost, high-impact strategies that boost loyalty and drive referrals
- Reinforces the role of the agent and staff as a core part of the value proposition

Learning Outcomes – Participants Will:

- Identify and eliminate "me too" features that fail to differentiate
- Build a powerful, personalized list of agency value-adds
- Learn how to communicate agency uniqueness with clarity and confidence
- Understand the concept of *lagniappe* and implement memorable "extras" that make clients stay
- Discover how proactive service moments (like rate increase calls or handwritten notes) build long-term trust
- Recognize their own value—because **you** are the one thing no other agency has

When your team believes they're worth it, clients will too. Whether you're trying to overcome price objections, increase retention, or simply remind your team of the impact they make—this session will equip your agency to sell and serve in ways that go far beyond the policy jacket.

