

## Heartland Agent Spotlight: Bryan Schweitzer

# The tale of a team

by Paul Morin

On the night of Aug. 31, 2001, **Bryan Schweitzer** was alone in his agency pacing excitedly back and forth waiting for a phone call from his AFE. He had great news to spread about that month's production numbers. When the phone finally rang, around nine o'clock, Bryan jumped for it—still unaware his Agency career was about to take a radical turn.

Until then Bryan had been running his young agency on the traditional model, in which only the agent met directly with customers, while agency staff provided clerical support. The industry was changing, with agents taking on more advisory and managerial roles, but Bryan's sales numbers were so good he paid no attention. That last night in August he was 30 apps ahead of schedule in Auto, 18 ahead in Fire, 12 in Life. Only in Health was he short. Two apps short. He was proud of himself, and assumed AFE **Duane Richter** would be proud of him, too. On the phone he rattled off his numbers in a happy rush.

"Well," Duane said, after Bryan finally took a breath, "you're two short in Health."

"I was devastated," Bryan recalls. "And so angry."

### Making hard changes

That night marked the beginning of a series of significant changes in the way the Schweitzer Agency in Bottineau, N.D., operated.

Bryan understood the point Duane was making: he couldn't sell it all himself. Eventually he'd start coming up short—before his first anniversary as an agent he was already burning out.

"I loved to sell insurance, I believed in it, and the relationship with the customer was great. But Duane made me see I couldn't keep going the way I was. Nobody could keep that pace up." Duane showed Bryan he wasn't using his team members to their



full potential. So in the following days Bryan and his team set about the long and, for Bryan, difficult process of dividing up his sales calls among his team, assigning specializations to each member. Duane also coaxed out of Bryan leadership qualities he says he didn't know he had.

Nowadays Bryan considers Duane one of his best friends. "Without that man I wouldn't be here today."

In the next year the agency increased production 30 percent. "And," Bryan adds, "we found out how much easier it is doing things the right way."

### Specialization set-up

The right way, in Bryan's opinion, gives each team member time to focus on individual lines. "You want them to take advantage of every possible opportunity for their line, and to do that you need specialization. You don't want them spread out over too many lines."

And so it is that veteran **Jill Vandal** is the agency's Bank driver, **Debbie Fauske** a specialist in Life and Health, **Tammy Murphy** and **Lisa Neameyer** the Auto and Fire specialists. Then there's **Rodney Schmidt**, the business, farm/ranch and multi-peril/crop-hail specialist, as well as their claim handler. **Khristy Erickson** focuses on marketing and compliance.





The turning point in Bryan's career came when he distributed his sales responsibilities among (from left) Tammy Murphy, Khristy Erickson, Heidi Schweitzer, Debbie Fauske (right of Bryan), Lisa Neameyer, and (back) Rodney Schmidt and Jill Vandal.

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Finally, Bryan's wife, **Heidi Schweitzer**, who spent eight years in CAPS and Fire Nat Cat in Lincoln, operates out of the Schweitzer home keeping on top of the agency's many administrative tasks while taking care of their children, Mason, a 2-year-old boy, and Morgan, a baby girl.

It goes without saying—in Bryan's office it does, anyway—that all full-time team members are fully licensed. Even Khristy, a part-timer, has her P&C licenses. "When we hire someone, before they even start working, they get their licenses. Within three months they're either SSA or LSA4."

#### **The motivation of Mexico**

Though each member focuses on an individual line or two, Bryan insists on challenging and rewarding them as a team.

At the beginning of 2005, he set goals in four lines—Auto, Fire, Life and Health—and told his team he'd take them on a nice trip if they reached all four goals. "The whole team had to come together," he said. At the Christmas party in April (since December's too busy for the agency to hold a Christmas party), the team found out how nice of a trip: a five-night, all-inclusive vacation in Puerto Vallarta, Mexico, CONTINUED



## **Bryan Schweitzer**

6-year agent

115 East 11<sup>th</sup>

Bottineau, N.D. 58318

(701) 228-3022

Chairman's Circle — 3 years

Select Agent — 5 years

Legion of Honor — 3 years

Incentive Travel Qualifier — 4 years

Heartland Pride Ring Qualifier: 2005 (1 month)

SVP Club: 2005

#### **Agency statistics as of November 2005**

Total households — 1,611

Products per household — 1.97

Three-line households — 16.39 percent

Households with Life — 19.8 percent



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**Magnum, CPCU.**  
Bryan celebrating  
his success in  
Hawaii with  
the man who  
gave him the  
wake-up call, AFE  
Duane Richter.



for all full-time team members and their guests—16 people in all.

"When the team qualified, back in December, it was probably one of the proudest moments I've had in my career," Bryan recalls. "Only half our team had even seen the ocean. This was an amazing, amazing feeling."

They've all seen the ocean now.

## Investment in the community

In the small community of Bottineau (pop. 2,200), 10 miles from the Canadian border, Bryan competes with nine other insurance agencies that together represent more than 20 different companies. Bryan has gained, it seems, not merely an edge over these competitors but dominance.

"None of the competition is ever willing to put in the time or effort, or make the investment in their community or their team members, that we do."

Bryan and his group continually work with the local fire department and the school systems—"Anything we can do to get before a large group of people."

They also frequently invite kids and their parents into the agency, in groups as large as 20-30, for a Saturday session of Steer Clear. Every time they've hosted it they've received Monday phone calls from parents asking, "Would you mind if we come in for a quote?"


## And many happy returns . . .

Despite his aggressive marketing and consistent advertising, Bryan feels the program that may reap the agency the greatest benefits is, surprisingly, their birthdays program. "It's how I know my customer," Bryan says. "It's how I keep the relationship there."

First they call each policyholder just before their birthday, wish them a happy birthday, confirm that the customer's information the agency has on file

is correct, and from there pivot into life or health.

Then the agency sends a birthday card—a real one, not automatically generated but handwritten and personally signed by Bryan. "It's nice because if I'm walking into the grocery store and I see somebody I can say, 'Hey, you have a birthday coming up—happy birthday!' And they just turn white. They don't know how I know that. Well, I know it because I just did their card."

One final detail reminds you just why Bryan and his team members deserve all the success they've achieved: the agency sends out anywhere from 200 to 300 personalized birthday cards a month. 

## Bryan's best bets:

### Receipt letters

Every single customer who mails in a premium—or drops one off—receives a mailed receipt for the payment. The team evaluates the policyholder with the Targeted Leads Household Manager, and with the receipt they include brochures on lines recommended by TLHM. Five days later they call and ask, Did you get the receipt for your premium? Did you get a chance to look at that other material we included?

### ADA

Bryan estimates he and his team use ADA to settle a whopping 80 percent of their claims. "It's a phenomenal marketing tool and relationship builder," Bryan says. "To deliver on the State Farm promise with a check that you yourself wrote—it's amazing." He also points out that it's cheaper—by hundreds of dollars per check—for an agent to draft a claim check than for the Company itself to do it.

### Quote with a professional-looking letter

"If they're calling five companies, we may be the only ones who are going to send out a professional quote. If they say no, we re-pend it. Later on, if their company hikes prices and they get upset, they're going to remember who was there, polite and professional, when they wanted a quote last time."