

# Roberts Allstate Agency

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## SPEAKERS

Mark Moss, Tiffany Losekamp-Roberts

**Mark Moss** 00:13

Hello, hello. Tiffany, can you hear me?

**Tiffany Losekamp-Roberts** 00:18

I can. Can you hear me?

**Mark Moss** 00:20

I can hear you just fine. How are you? I'm Mark.

**Tiffany Losekamp-Roberts** 00:23

I'm good. How are you?

**Mark Moss** 00:25

Doing good doing good. It's a rainy day. I'm calling you from the Cleveland Area. I see you're here in Dayton. You have Bill's Donut Shop down there.

**Tiffany Losekamp-Roberts** 00:37

We do. We do. have a Bill's Donut Shop.

**Mark Moss** 00:40

I went to school at Toledo. And I had a buddy that went to Centerville High School. So once in a while, he'd come back with Bill's Donut Shop doughnuts from down there. So that's pretty good stuff.

**Tiffany Losekamp-Roberts** 00:52

It's a 24 hour donut shop. You don't see those very often.

**Mark Moss** 00:56

Oh, it's 24 hours? Jeeze! Nothing like a 3am donut, huh?

**Tiffany Losekamp-Roberts 01:02**

Yeah. That's why the college kids like it.

**Mark Moss 01:05**

That's awesome. So thanks for taking the time to join. I know, Matt Crawford, he referred you over to me and said you had some success using Call Logic with lead manager. I know, there's some other things you want to talk about as well, too. So I work on our product marketing team. So I work directly with our marketing team. And then also, I provide any feedback to our development team as well. So I'm kind of the middleman in between those different departments. And, you know, I love talking to different agents here and their perspectives, you know, pain points they're having and any ways we can help alleviate those. So, Tiffany, I know it looks like- I was looking back at the record. Are you a relatively new agent?

**Tiffany Losekamp-Roberts 01:46**

Yeah. September.

**Mark Moss 01:48**

September. Okay. So what made you jump into the insurance realm? Have you been in that previously or what's your your backstory?

**Tiffany Losekamp-Roberts 01:55**

I actually- So I'm married to a man who, Randy, he's been doing insurance for like 30 years. So he's actually already own the name agencies, actually multiple agencies. But he's a really good salesperson, but not necessarily a good business mind.

**Mark Moss 02:14**

Okay.

**Tiffany Losekamp-Roberts 02:16**

I actually am finishing up my PhD and training and education. And I was a nursing professor before I did this. I actually worked- I was an earth scientist with air force for a while to before this. So I'm a full fledged nerd, self proclaimed nerd, that's what I do. I'm a spreadsheets, leadership, mission statement, you know, that kind of vision person. So I'm really organized, and I'm good at the stuff that he's not good at. So we're pretty good team. I will never be as good of a salesperson as he is. I won't, and then it just never will, because he's got charisma that you can't teach. But I've got organizational skills that he'll never have either. So I feel like we're really good team. So yeah, we bought it. And so he asked me if I want to own a business, and I've always wanted to own a business. And I was like, Okay, so that's my backstory. We bought this in September from Tony Pay. It's a \$2.5 million book and we've been doing all right. We already won awards. We already did on honoring and national conference since September, so we had September to December to get it and we did.

**Mark Moss 03:31**

Okay, so you guys call it the yin and the yang. They're together the organization and the sales and you said you were a nurse there in the Air Force. Did you work at the base over there?

**Tiffany Losekamp-Roberts 03:40**

Yeah. So I worked at USAFSAM, which is the School of Aerospace Medicine at Wright Patt.

**Mark Moss 03:47**

Okay. Oh, very good. Yeah. I've always wanted to go to the museum over there. I haven't quite made it yet. But I heard they have-

**Tiffany Losekamp-Roberts 03:53**

It's nice. It's big.

**Mark Moss 03:54**

Yeah. They have all the Air Force Ones ever heard.

**Tiffany Losekamp-Roberts 03:58**

It's actually better than the Smithsonian, if you ask me. Like, I feel like it's a better museum. And not just because I'm biased. It's just larger, and it has more stuff in it. And I actually, I just think it's a better museum altogether. So I've gone there. It's free too. So you get to go there.

**Mark Moss 04:19**

Is there any UFOs there? Anything like that I should know about?

**Tiffany Losekamp-Roberts 04:23**

Have you been watching that show on Netflix? I forget what it's called. But there's a whole show about it. That's stationed in Netflix.

**Mark Moss 04:30**

Oh, really?

**Tiffany Losekamp-Roberts 04:31**

In Wright Patt, yeah.

**Mark Moss 04:32**

Oh, I didn't know that. No, I was just seeing there was the 60 minutes report that came out of like the UFO stuff a couple of weeks ago. And they showed like the Air Force video and I was like, yeah, it's kind of interesting. Don't know if Wright Patt has anything there but you never know.

**Tiffany Losekamp-Roberts 04:48**

Yeah, that well, I guess that this TV show is all about- and it's located in Wright Patt and it's about the Air Force investigating UFOs and apparently it's supposed to be based on a true story. Some of stuff they find is kind of cool.

**Mark Moss 05:04**

Interesting. You know what it's called? I'll look it up.

**Tiffany Losekamp-Roberts 05:07**

I don't remember right now, but I really like it. Like, I've watched the whole thing. Whenever I get stuck on a show, it's like my job to finish it. So like I finished the entire season in like two days.

**Mark Moss 05:16**

Oh, geez, you're a binger. Okay.

**Tiffany Losekamp-Roberts 05:18**

Yeah. I forget what it was called, but it was so good. I have to look. And I'll email it to you if I if I remember.

**Mark Moss 05:26**

Okay. All right. Thank you. Anyway, so when did you start using Call Logic? Looks like it has been relatively recently or is it been a couple months?

**Tiffany Losekamp-Roberts 05:35**

No, I actually think we bought it, you bought it before the end of the year. So we've had it for a while. You know, we weren't really sure kind of what we were going to do, what was going to work for us as a business model. And, you know, a lot of agents do like a call center kind of mentality. We tried that at first. So we were making like, lots and lots and lots of calls. But what we found is we got to have like a little mix. So at first you know, we got the Call Logic because we were kind of doing the call center mentality. But you know, we still do about 300 calls a day per person, it only takes like two hours though, because, you know, we just let it run. And then our people only have- I just got these nice headphones - they just sit and let the calls go through. And then they do other things. So they write their thank you notes, or they do whatever kind of the low stuff that needs to be checked off their list, while they let the calls go. And on average, you know, make 300 calls, we might make, you know, 1-2% of them might come out, we do a lot of the Lead Vantage leads. Okay, so we also do the Centralized Internet leads, but those weren't as successful for us. We actually find either the old leads, or the Centralized Internet leads, when it's been like, a few months are the best ones that convert to new sales.

**Mark Moss 07:09**

Why do you think that is?

**Tiffany Losekamp-Roberts 07:12**

I think for the centralized internet leads, they get bombarded, then people get mad. So like, unless you're the very first person to call them they get irritated. Randy had somebody hang up on yesterday. So you know, I feel like it's too much all at one time, I wish I wouldn't sell those to a lot of different places, because then it just causes problems. The person just gets angry. So we find that, you know, sometimes those are better to sit on for a while, you know, we we might reach out in a week, if they haven't made a decision, and then in a month, and then we'll reach back out and in a few months to see, you know, if they're still shopping, or if they're happy with the choice they made.

**Mark Moss** 07:54

Okay? And are you doing those using Call Logic those follow up calls are those more just, you know, kind of a one off in the system, randomly.

**Tiffany Losekamp-Roberts** 08:01

No. So, we have a couple sales people and they'll make campaigns. Okay, for the centralized, the older centralized internet leads, like we try to make folders inside of the Lead Manager and they'll they'll pick their campaigns from those different folders.

**Mark Moss** 08:18

How many employees do you have that are using Call Logic, that are making about that 300 call market day?

**Tiffany Losekamp-Roberts** 08:26

Two LSPs and then my husband is like part time sales manager/part time, you know, sales, so he doesn't do as many campaigns. He only does a few a week, but LSPs for the most part, I mean, you know that we have like a triangle that they have to try to do. So they make three sales, then we really don't push the 300 calls. But if they don't make three sales, we look for, you know, seven quotes, if they didn't do seven quotes, we look to see if they did the 300 calls, and they didn't do the 300 calls, then we're asking them like why they didn't do it.

**Mark Moss** 09:03

Okay.

**Tiffany Losekamp-Roberts** 09:04

So it's like if they achieve any of those down the line, we don't really say anything, but for the most part they do 300 calls just because it's not that hard to do. It's fast

**Mark Moss** 09:13

Three sales, what's your timeframe on that, that three sales to have that done by?

**Tiffany Losekamp-Roberts** 09:18

Every day.

**Mark Moss** 09:19

Every day? Okay, so three sales. Okay, well, very good.

**Tiffany Losekamp-Roberts** 09:23

We try to do one to three sales, we really want three sales, but we'll take you know, a sale's a sale so.

**Mark Moss** 09:31

So would you say that making those 300 calls has contributed to achieving those three sales. I mean, I'm sure certain days it may be a little bit different than others, but based on your experience?

**Tiffany Losekamp-Roberts** 09:43

well, so most of those campaigns, like I had said, you know, we have 1000s and 1000s of lead Vantage in there. So it's like calling out to the phonebook. Those you can't do any other way. You just have to keep doing campaign after campaign after campaign. And surprisingly, lately, honestly, we have been having a little bit of success with that. So I think we've gotten a handful of sales out of the Lead Vantage, you know, leads that we get. And that's strictly, you know that they have to do those campaigns. Same with doing like the older leads. They're done on campaigns and the older centralized internet leads are done on campaigns too.

**Mark Moss** 10:30

So before doing the Call Logic and the campaigns, was your agency making manual phone calls or I know, you bought the book in September, whatnot, but what was that process? Like before you added Call Logic?

**Tiffany Losekamp-Roberts** 10:41

So we couldn't do 300 calls. So at first, we were, you know, trying to figure it out. I honestly don't know how people are doing any kind of like large volume calls without something like the Call Logic is, I don't know. I don't know how you could do it, because you physically couldn't dial 300 numbers that quick. So you know, I think, you know, Randy is old school, he's a little bit older than me and he would say 100 calls during the day, 100 manual calls. So at first, when we didn't have any of the stuff that we have now, that's really what we're pushing for, you know, around 100 calls.

**Mark Moss** 11:23

Wow. So then this has only exceeded that, then that's good to hear.

**Tiffany Losekamp-Roberts** 11:27

So it'll be 100 calls in a day and now we're doing 300 calls in a couple hours.

**Mark Moss** 11:32

That's incredible. Are some of those reps getting more than 300 calls a day?

**Tiffany Losekamp-Roberts** 11:38

They may. So like I said, we weren't really successful at being like a call center. I think because of my background, being a nurse, I want more personal interaction with the people that we have as clients and I like to talk to them a little bit more. So we have partnered with a lot of mortgage companies and real estate agents, and I have five mortgage companies that kind of use us, and then we're trying to get 10. And we have two real estate agents that use us. When people don't have insurance, they recommend us. So that's where the other half of those leads and sales are coming from. That that business honestly converts at a much higher percentage show just making calls. Right, you know, talking to a, you know, 90 plus percent. So that's the other half of the day when they're not making those calls, that's what they're doing is kind of reaching out to the mortgage companies and real estate agents and seeing if they have anything for us.

**Mark Moss** 12:48

right, yeah, and you got to have multiple avenues. It's like, there's some agents, they think, you know, you have to have one strategy. You stick with it. Well, it's like, well, you're not going to reach your, your full potential, you know. You got to have the referral sources, you know, whatever it takes, or by different lead providers. But there's some agents that insist on trying one way, and there's some I've talked to, they just do referrals. And, you know, maybe that's what they're satisfied with. But if they supplemented other things in their agency, like what you're doing with the Call Logic, they could be getting even more business for themselves. I think I'm from my experience, talking them what they kind of want, in their agency that their goal is to be, but there's Allstate have specific call goals or anything like that for you to achieve, or is it just more sort of sales goals?

**Tiffany Losekamp-Roberts** 13:35

Sales goals.

**Mark Moss** 13:37

Okay.

**Tiffany Losekamp-Roberts** 13:37

Now, the sales goals are pretty high. You know, I think that's another thing that's been kind of interesting, because I started in September, and Allstate's been going through a lot of changes since September, like significant changes. You know, they change their coding platform, they've changed how they've done multiple things. So I feel like, you know, it's been a little difficult being a new agent during this time and if I didn't have my husband, I think it'd be a little bit lost. And I have a really good FSL. He's actually technically not my FSL anymore, but he's the one that hired me on. And so like, he's really helpful to me. But I think that's important too, because, you know, Allstate seems to be in this changing mode. And you have to diversify, because you don't know which way they're gonna go. Allstate you know, we're we're competing against one 800 number. And, you know, I didn't want to put all of our eggs in a basket of just making phone calls, I mean, call center, because Allstate itself is doing that. So why do you want be an agent when you can save money actually calling the 1-800 number. So, you know, we're just trying to do a little bit of everything so that we have multiple avenues of business coming in and we're not locked into one thing.

**Mark Moss** 14:59

Absolutely. What would you say to someone because, and we'd always get this. I mean, I used to work on the sales side, and then a little bit the account management side as well. A lot of agents believe that they don't need to be calling at all. And they think they have enough from referrals or whatnot. They think, oh, calling it doesn't work anymore. It doesn't work. What would you say to someone who says that?

**Tiffany Losekamp-Roberts** 15:22

Um, that they don't think they need to be doing any calls?

**Mark Moss** 15:27

Right. Yeah, they don't think they need to be doing any sort of outbound calls. Now, of course, you have to make, you know, the one off follow ups and things like that. But I guess sort of what you're doing, like the campaign calling.

**Tiffany Losekamp-Roberts 15:38**

I don't know how they're surviving. Honestly, like, I don't. You know, we're doing a lot of different things. And I feel like we're doing a good job for being such a new agency, like we're hitting goals. And like I said, we hit on a ring, and we hit national conference. But I think referrals are something I actually wish we were a little bit better at. But I don't know how you're getting new business and new lines of business into your book, if you're not doing a little bit of everything. I don't understand. I feel like there's a lot call reluctance. I get it because I'm a nerd, right? So I'm an introvert. This calling out and stuff isn't my deal. But a lot of people you know, are not nice when you call. It's hard to have that kind of mentality and let it roll off your back and not really get upset. But you know, I think we've hired a lot of people that we thought were going to be really good salespeople, and then they were scared to call. So they just didn't work out. You know, I get that. And that's something I think a lot of people have, but kind have to get past that. So that you can grow. Like I don't know how you're going to break into different markets, I don't know how you're going to break into different zip codes. I don't know how you're going to- like, if you're not reaching out trying to get new business, I don't know how you're doing any of that. If you're just doing referrals, you're literally probably staying in the same few zip codes. And, you know, when you want a larger book, my goal is to be at least 5 million in the next two years. That's not going to happen if I'm staying just within my few zip code. So I don't know how you're getting kind of fresh, fresh business in. Does that makes sense?

**Mark Moss 17:28**

Oh, absolutely. Yeah. And that's actually kind of what you said there. I talked to a recruiter last year. And you know, he works in the recruiting space, of course, but he talked about call avoidance was the call reluctance he talked about amongst his recruiters. And that was a big thing that they had to overcome. You know, as far as get through the mentality, get in that calling mentality. Has your agency had any sort of tips or advice for your LPS to get out of that call reluctance or call avoidance you might face, especially for new hires.

**Tiffany Losekamp-Roberts 18:01**

When I first started, we had four people and we really thought they were experienced, they had worked in call centers before. They had worked in the insurance before. And ironically, three of them did not work out. The ones that have worked in call centers before could not work out, because they were used to getting inbound calls, not outbound calls.

**Mark Moss 18:20**

Ah, Okay.

**Tiffany Losekamp-Roberts 18:22**

So we learned a lesson there, that, you know, just because somebody has done a call center doesn't mean they're going to be, you know, into making calls out. And we also now that when like, when we interview people, we just are honest, like 40% of your time is spent on the phone. How do you handle



rejection? Tell me what you do when, you know, somebody calls you a horrible name and hangs up on you like, what are you going to do to kind of brush that off, and then kind of roleplay with them and that kind of stuff. So we're trying to pick people that we know upfront aren't going to have that. But to get over it, we haven't found a magic pill to make people get over it. We've had to let quite a few people go because they didn't get over it. Like I say there's some irony there because you know, three of them worked in a call center, and you thought Oh, call center, they're going to be used to making calls. Not only weren't. They the actually probably were some of the worst call reluctant people that we've had.

**Mark Moss 19:19**

Wow. Well, like you said, they're getting the inbound calls. So they're probably getting, you know, warmer calls in there. And I don't know what they work. There was sales, or maybe it could have been customer service calls they're getting-

**Tiffany Losekamp-Roberts 19:29**

They were sales.

**Mark Moss 19:30**

Oh, they were sales. Okay, that's interesting, because I know when you do the outbound call, and I've, I've done it, you know, it's definitely a different ballgame. And, you know, you got to kind of have your head down, and you got to stay positive on it, because it's a numbers game like you guys are experiencing too. I know that very well. And I've used Call Logic internally myself. So you know, as far as your agency, you know, you've been doing this here for since the end of last year. What's one piece of knowledge that you would pass on to other agents that you've learned along the way, maybe that you haven't shared already today?

**Tiffany Losekamp-Roberts 20:03**

I think you need to pay attention your business plan. So one of the first things I did was, relook at our mission and vision when we've been in business for a couple months. And we look at our business plan. And it's easy to get like sucked down into all the things that have to be done every day and dealing with, you know, claims issues, or customer service issues or whatever, and losing sight of where you're trying to go. And I think one of the reasons my husband actually wasn't- he did all right, as a as a business owner, when he owned his own agencies, but the thing that kept him from growing as large as he wanted to grow, was that he was doing the everyday like on the phones stuff. He was selling, because that's what he's best at. So that's what he gravitated to. If you're doing that as an agency owner, then you're not looking forward, you're not thinking about, you know, where you're trying to go. So that's why Randy and I, I think, work really well together because I do customer service here. And we have another customer service person, but I also spend a good portion of my time and I block out pieces of my time to make sure we're going in the right direction, to looking at doing minority stuff looking at, you know where our sales are coming from what zip codes our sales are coming from thinking about ways to increase our volume of reaching people, looking at marketing, looking at making sure that we're achieving our vision and mission and our core values, and making sure that all of our people know our core values. I think that's important too, because your culture of your agency is really important. So like our core values are teamwork, reliability and integrity. And that's everything that we do we look at it through that lens. So if we have a questionable situation, and we're like, well, we don't

know what we should do, we look at it through that lens to try to make those decisions, even with our employees, like, you know, and we lay that out, too, when we interview people, we make sure that they're going to fit into our culture. So that was a lot of information. But basically, I would suggest, number one, don't forget that you're the business owner. Number two, and that you're the business owner, and then that comes with responsibilities that you can't forget about driving your business in the right direction. And two, you know, making sure that your business plan and that you're achieving it, that you're doing it, and then looking at the metrics and making sure, like, you can think one thing, but the numbers don't lie. The numbers are gonna tell you what the real situation is. So, you know, your numbers are going to tell you where you spend your time. And you have to be flexible. So like I said, at the beginning, we were doing a call center mentality, and it just didn't work for us. It may work for other people, but it just didn't work for us. So we started mixing it up. And that is working for us. We're doing much better now than we were just four months ago. So you know, you've got to constantly looking and then make those changes quickly. Don't let yourself get sucked down into not meeting goals or whatever. And then making a decision. You know, part of being a business owner is looking at those metrics and making those adjustments as needed and quickly.

**Mark Moss** 23:37

Absolutely. And I totally agree with the culture aspect. I think that's huge, especially because you're in an office environment, you're in a relatively just a couple of people, you know, working together, and there's going to be things that are gonna go wrong or stressful times, but you got to band together and you can't bash anybody or anything like that. Because you know, and I've been in some different environments in my young career still, initially, I mean, I won't go to that. But basically, I've seen some corrosive cultures. And that's why I've worked for this company for a while because it's a good culture. And I think that makes you stick around and contributes to your employee retention, which is, you know, pretty big and your performance to. Last question I had. So what's the name of your agency? The official name.

**Tiffany Losekamp-Roberts** 24:22

Oh, it's the Roberts Allstate Agency? You'll also hear it called Tiffany Losekamp-Roberts Agency. It's called all kinds of things. Official doing business as name is Roberts Allstate Agency, but like I said, Allstate often calls me Tiffany Losekamps Roberts Agency. I didn't want to I didn't want it to be my name because my, like, I'm on everything. I'm technically the owner, but my husband and I are doing this together. So to honor him, that's why I named it the way I did, but

**Mark Moss** 24:56

they're your tech co-owners. That's how you'd word it.

**Tiffany Losekamp-Roberts** 25:00

Yeah. And that's how we work is that we're co owners. Technically, I'm just the owner, but we function as co owners.

**Mark Moss** 25:12

Okay. So what I what I'm going to do then is I take the interview here we did today, and I give it to marketing and they clean it up, and then they do a short write up. And, you know, they'll snip it up and

everything and put it on social. So I'll say that you guys are co owners just so we're clear on that. So when do you get your PhD then? When do you graduate?

**Tiffany Losekamp-Roberts 25:33**

So I'm done with all my coursework and I'm will be my dissertation now. So just whenever I get my dissertation done. They're kind of on me about getting it done in the year. So we'll see. I'm also trying to do my series six at the same time.

**Mark Moss 25:49**

Wow, you're busy woman. Geeze!

**Tiffany Losekamp-Roberts 25:53**

I am. We have a family and you know, take care of my father in law's right. And it's kind of crazy, but, you know, I've always been one to jump off the cliff and to go for the adventure. So it has been an adventure. It's been good so far.

**Mark Moss 26:08**

Yeah.

**Tiffany Losekamp-Roberts 26:09**

Well, we made the decision. I'm here to be at 5 million and have a little bit more time to myself.

**Mark Moss 26:20**

Awesome. Yeah. Well enjoy the ride. I mean, that's quite a jump from the medical industry into business. You know that. That's very cool. very ambitious. So congratulations, and hope I can check out the Air Force Museum soon.

**Tiffany Losekamp-Roberts 26:34**

Yeah, do.

**Mark Moss 26:35**

I'll ask about UFOs. When I go there, I'll be that weird guy. But you know.

**Tiffany Losekamp-Roberts 26:40**

I look for that show as soon I hang up with you. I'll see if I can find it. But it was really good. I literally watched it like it was my dog.

**Mark Moss 26:46**

Okay, cool. Yeah, my wife and I are into that weird stuff. So I'll tell her. But very good. So what I'll do, I'll get this information over to marketing. When it's all done. I'll send it to you. So you can view it as well. If you want to post on social, whatever you want to do, feel free. I do want to send you a quick Capterra link to I don't know if you ever heard of that. It's basically like a software review. It takes like not even two minutes. Just a few, you know, snippets of how you like to Call Logic would be great. Just helps other software buyers but that's all I got. And summers around the corner here. I can't wait.

**Tiffany Losekamp-Roberts** 27:19

Yeah. All right. Well, thank you so much.

**Mark Moss** 27:22

Thanks, Tiffany. Take care.

**Tiffany Losekamp-Roberts** 27:24

You too.