

## List of Resources from ISU Steadfast APF Meeting

### Employee Training

- Carrie Nelson: Uses [USLI coach for producer training](#)
  - They interview, pay 50/50 salary and train them
- Todd Hufford/Jeff Brehmer: [Trainual](#) – a training and documentation platform to standardize processes
- Todd Johnson: [Total CSR](#) – training system for CSRs to build skills and consistency
- Todd Johnson: [Emma Breathing Room](#) – Sales Consultant (cheap but good)
- [Liberty Mutual Pace Setters](#):
  - Eric, Whitney, Jarrod, Christopher Cook

### Employee Accountability/Tracking

- Doug Johnson uses [Active Track](#) for employee accountability
- Whitney uses the Applied tool

### Hiring

- Whitney: Idea Traits
- Ryan McEaton: [Staff Boom](#) - outsourcing and staffing

### AMS

- Ryan McEaton: [Kite Technology](#) – build out Applied Epic
- Christopher Cook + Michelle and Terry O'Connor: [BT Core: Salesforce Instance](#)

### MISC Resources

- Monty Ross: [Gaya](#) – Super copy paste
- Monty Ross: [OutMarket](#)
- Whitney Ricci: Change Management Framework (Word doc) – a tool for guiding staff through new technology adoption
  - Jeff has a process as well
- Todd Hufford: Blank Playing Cards – creative sales team exercise/tool
- Lawson: The 4D's Framework (Do, Defer, Delegate, Delete) – productivity tool for prioritizing work
- Matt: does a lunch and learn with realtors for partnerships
- Stratification of book → Monty, Terry, Joe, Jeff have all done this
- EOS → Terry, Todd Johnson, Whitney and Jeff
- Email Management: [Fyxr](#) or [Superhuman](#)
- Fractional CFO Services

- [AgencyFocus](#) – Monty Ross & Lawson Walker
- RD Advisory Group ([AgencyCFO](#)) – Christopher Cook

**Books Mentioned:**

- [Traction](#)
- [Who](#) by Geoff Smart
- “[From Strength to Strength](#)” by Arthur Brooks
- [Who moved my cheese](#)
- [Rocket fuel](#)
- [Geff Woods Ai Book](#)
- [Zach Hoss Youtube Video on Changing your perspective of AI](#)