

WHERE DOES YOUR AGENCY NEED THE MOST HELP?

Strategic and Financial Management	Sales Management	Operational and Workforce Management	The Executive Circle 
Business Planning Helping agencies set defined goals as well as benchmarking to track progress of those goals.	Monthly Virtual Sales Meetings Monthly sales call with owner and producers to discuss wins, challenges, and upcoming activity.	New Hire Onboarding Staff recruitment, onboarding, and tactical plans to make sure that you hire the RIGHT staff.	Full Suite of Agency Prosperity Consulting Services <ul style="list-style-type: none"> • Strategic and Financial Management • Sales Management • Operational and Workforce Management
P&L Evaluations Analytical review of what is going well, what is not, and most important...WHY. Identification of opportunities for profitable growth and efficiencies.	Producer Sales Coaching A series of webinars/classes on: <ul style="list-style-type: none"> • The Sales Process • Product Knowledge • Networking • Selling Yourself 	Organizational Change Management Assistance Do you need help implementing a new project, procedure, training, etc.? Are you an exclusive agent, going independent and need a game plan?	Agency Valuation and Perpetuation Planning FREE Annual Agency Valuation to be able to benchmark your agency growth and value year over year.
Customized Reporting for Various Agency Departments Developing, measuring and tracking KPI's that the agency owner can use to make key decisions for the agency's strategic financial plan.	Marketing and Pipeline Development Putting together a plan to attract new prospects (i.e. lead generation, local events, community sponsorship, etc.) and monitoring the results of those activities.	Leadership Development and Coaching One-on-one coaching with agency owner and key staff (office manager, marketing manager, etc).	Due Diligence on Mergers and Acquisitions Analytical review of potential M&A with free tools from IIANC.
Customized Dashboard Development From: <ul style="list-style-type: none"> • AMS Reports • Carrier Reports • Phone System Reports • Any Current Custom Agency Reporting 	Producer Reporting <ul style="list-style-type: none"> • Tracking Quote Ratio • Close Ratio • Income per Producer 	Workflows and Procedures Development Review and development of agency business processes and workflows to achieve the maximum benefits to the agency.	Quarterly "Partners Call" with IIANC Executive Team Meeting to discuss the industry trends and various topics.
Monthly Dashboard and Reporting Deliverables Monthly send of agreed-upon reports and dashboards delivered by 10th of each month.	Sales Process Development "Soup-to-nuts" evaluation and potential creation of the Agency Sales Flow.	Monthly Virtual Ops Meetings Monthly call with owner and operations leadership.	Panel Seat at Agency Prosperity Forum Annual Forum to discuss innovation, growth, technology, and data analytics.

