

FREE AGENCY CONSULTING PROGRAM

IIANC knows that our members are often looking for a knowledgeable, qualified resource to consult with on a variety of topics like agency management, automation, performance management, perpetuation planning and more. That's why we have partnered with **The Moberg Group**, a known leader in the insurance agency consulting arena, to connect you with a trusted resource when you have questions. And as an added bonus, ***your IIANC membership gives you up to one (1) hour of phone consultation annually at no charge with The Moberg Group.*** The complimentary consultation is broken out into two 30-minute segments each six months. They are also available to help should your agency have additional needs or projects (*addl. fee schedule applies*).

Management Strategy

- Sales & Marketing
- Agency Performance (prior, current, planned)
- Preliminary Industry Performance Evaluation
- Agency Perpetuation
- Profitability: EBITDA earnings before interest, taxes, depreciation & amortization

Process Optimization

- Evaluate Current Workflow
- Productivity Analysis
- Standards
- Procedure Documentation
- Quality Assurance Practices
- E&O Status

Automation Analysis

- Agency Automation
 - > Current utilization
 - > Current automation plan
 - > Disaster recovery plan
- Document Management Strategy
 - > Review and advise

Performance Management

- Talent Management
- Hiring Practices
- Compensation Programs
- Staff Evaluation/Recommendations

ABOUT THE MOBERG GROUP

With 25 years experience in almost every aspect of the insurance industry, The Moberg Group can provide the solutions you need to help your agency succeed. The Moberg Group is a leading provider of independent agency consulting services and the largest provider of E&O loss control programs for independent insurance agencies. Regardless of the size of your agency or brokerage, The Moberg Group's team of highly experienced consultants can assist your organization in a cost effective manner to help you move forward profitably and efficiently into the future.

ADDITIONAL SERVICES

The Moberg Group is IIANC's recommended provider for E&O audits with their "Agency E&O Review Program." They also publish the most widely used Agency Operations & Procedures Manual for insurance agencies, on which IIANC members receive discounted pricing.

For More Information:

Moberg Group
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