

A photograph showing a group of business professionals in a meeting. One person is holding a tablet displaying a pie chart and bar graph. Another person is using a calculator. There are papers and a pen on the table.

STRATEGIC PLANNING CONSULTING

Enhance your organization's strategic planning process.

Having an effective Strategic Plan goes far beyond an effective facilitation of your planning retreat. Aubie Knight, CIC, CRM, CEO of the Independent Insurance Agents of North Carolina, offers a tailored strategic consultation designed specifically for 501C(6) associations. Aubie's process is about building a roadmap for your organization's future, ensuring that your current resources and aspirations align with a practical path forward.

Aubie starts by helping your organization assess its current state, using an Organizational Health Survey as a "self-audit" to ensure your vision aligns with your resources. This ensures that goals are not only ambitious but also grounded in operational excellence. Aubie emphasizes that "Strategic planning should be paired with effective business planning. Until your operations are optimized, pursuing BHAGs (Big, Hairy, Audacious Goals) will be difficult."

Ambitious goals are essential, but Aubie helps break them down into achievable steps. By reverse-engineering long-term goals, we can focus on what needs to be accomplished over the next 12-24 months, ensuring that your organization's vision stays within reach while being grounded in the realities of your capacity and resources.

What will your company receive?

- **Organizational Health Survey Report**
- **Employee Engagement Assessment Results**
- **Mission & Vision Alignment Review**
- **Financial Review Analysis**
- **Final Strategic Plan** with specific, measurable goals and action plans

Process Overview:

1. Organizational Health Survey:

- A self-assessment to evaluate where your organization stands today.
- Identifies strengths and areas for growth.

2. Employee Engagement Assessment (Gallup 12 Questions):

- Evaluate employee morale and engagement, ensuring internal alignment with strategic goals.
- Collect insights into your workforce's current capacity and enthusiasm.

3. Mission & Vision Statement Review:

- Review current mission and vision statements.
- Assess whether they align with where your organization aspires to be in the future.

4. Financial Review:

- Analyze the organization's financial health to ensure goals are supported by resources.
- Identify areas of strength and those that may require attention.

5. Reverse Engineering BHAGs:

- Break down long-term goals into smaller, actionable steps over the next 12-24 months.
- Ensure your goals are both ambitious and realistic, aligning with operational capacity.

6. SWOT Analysis & Environmental Scanning:

- Conduct a thorough review of your internal strengths, weaknesses, and external opportunities and threats.
- Stay informed of industry and market trends that may impact your strategy.

7. Goal Setting Framework:

- Set measurable goals in key areas: Financial, Customer, and Employee/Staff.
- Develop action plans to link short-term achievements with long-term vision.

8. Implementation & Measurement:

- Create a detailed timeline, assign responsibilities, and establish KPIs.
- Ensure regular review and adjustments to the strategic plan.

Why partner with Aubie?

With over 30 years of leadership experience, Aubie brings a wealth of knowledge from the association and insurance industries. Under his leadership, IIANC has doubled its revenue, grown its staff by 48%, and launched two major BHAGs in the past three years: InsurAcademy and 101 Weston Labs. Aubie is known throughout both the association world and the insurance industry for his bold visions, creative approaches to problem-solving, and a constant desire for growth and evolution. His strategic consultation services provide actionable insights, ensuring your organization is positioned for sustainable success, with a focus on both growth and operational excellence.

Fee Structure:

The fee for strategic planning consultation starts at \$3,000, with some flexibility based on the organization's specific needs. Client associations will cover travel expenses. Deliverables will typically be provided within 30 days of the consultation meeting.