

"Jason cares about my agency. He celebrates our accomplishments and looks for solutions to our challenges. He's full of enthusiasm and ready to tackle the task at hand. Jason is very well connected to resources that have proven to be beneficial to our agency. I would highly recommend working with Jason."

- Daniel Rohrbaugh, Raleigh Insurance Group

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## Contact Jason Sabo

Business Consultant, IIANC



call: 919.377.1641  
call or text: 860.338.3752



jsabo@iianc.com

"Jason Sabo has been phenomenal in adding another resource to our team! There were many sales management items that we wanted done, such as developing and tracking reports on producer activity levels, that we simply did not have time to track and maintain. Jason came to the table with a recommended format, and the ability to track and distribute them monthly. Thank you, Jason!"

- Cameron Annas, Granite Insurance

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Grow your business. Today.

# CONSULTING SERVICES

Let us be your strategic business partner and put your agency on the path for success.

# MONTHLY PACKAGES

## SOLVE PROBLEMS - FOCUSED STRATEGY

Let's tackle one challenge at a time!

Starter Package: 2 hours: \$295 (monthly)

- Identify growth opportunities in current agency operations
- Maximize staff efficiencies through customized workflows
- Implement new technology into workflows to streamline processes
- Increase revenue through customized cross sale & prospecting scripts
- Boost sales by creation of staff sales incentives
- Train staff to create sales opportunities during service tasks
- Connect with more prospects through targeted marketing campaigns

## EXPERT ADVICE - IMPROVE OPERATIONS

Optimize your agency's performance

Performance Package: 6 hours: \$795 (monthly)

Includes everything in the Starter Package, plus:

- Assess staff to ensure the right people are performing the right tasks
- Maximize staff efficiencies through enhanced workflows
- Set clear staff performance expectations through updated job descriptions
- Development of effective goals for agency staff performance
- Ensure quality work standards are met by monitoring of service levels
- Retain your staff by designing an agency career development plan

## BEST PRACTICES - EXECUTIVE AUTOMATION

Become more effective with every interaction

Executive Package: 10 hours: \$1,495 (monthly)

Includes everything in the Performance Package, plus:

- Increase staff prospecting activities by implementing automations to free up staff bandwidth
- Streamline onboarding and training process to get new hires job ready faster
- Achieve sales goals by implementing a producer accountability system
- Improve staff retention and engagement by focusing on company culture
- Enhance team communication and collaboration through effective meetings
- Virtual training to increase staff knowledge and impact on agency goals
- Strategic planning to build agency value and long-term success

# HIRING PACKAGES

## SCALE FASTER - VIRTUAL SUCCESS

Allow your staff to focus on the customer, not the busy work

Virtual Experience Package: \$1,195 (one-time payment)

- Save time and resources getting a virtual assistant hired and trained in your agency
- Identify staff task pain points to outsource to a virtual assistant
- Schedule interviews with multiple virtual assistant candidates that fit agency needs
- 10% IIANC member discount on Agency VA staff services
- 4 hours of consulting to help onboarding

## ELEVATED RESULTS - AGENCY PREMIER HIRING

Stop wasting time, hire and retain the best, get proven results

Agency Premier Hiring Package: \$2,995 (one-time payment)

- Save time and resources getting the right person hired faster
- We will manage the application review process and screening of candidates giving you an improved experience: providing only qualified candidates to you to interview
- Attract top agency talent through customized CareerPlug page set up
- Compelling job posting tailor made for your agency
- Custom applicant scorecards allowing you to measure candidates quickly
- Customized job links for effective hiring (Facebook, social media)
- Reduce interview prep time with Best Practices resources and templates
- Personality assessments designed for your open position
- Employment Offer letter templates
- Reference Check template