

# WHO WILL LEAD YOUR AGENCY INTO THE FUTURE?

*What would it mean to your agency to know that you and your emerging agency leaders are prepared to take the agency into the future, with a plan for succession?*

*What could you do if your agency could generate \$100,000 in new commissions per producer, per year?*

INNOVATIVE  
LEADERSHIP



**Trusted  
Choice®**

**INDEPENDENT INSURANCE  
AGENTS OF NEBRASKA**

## INNOVATIVE LEADERSHIP

Here at IIAN we are concerned about your agency's success now and in the future. Many forces now shaping the insurance environment have not been present before. One of the most important is the need for agency leadership in the coming generations.

**A year-long leader and agency development program for emerging independent agency leaders** – designed specifically for IIAN members by a team of experienced Nebraska agency managers, along with one of the nation's re-eminent agency management authorities, based right here in Nebraska.

**Innovative leadership** is for **current and emerging agency leaders** who want to thrive now and in the future by implementing proven techniques for independent agency success and excellence.

Please be forewarned – **Innovative Leadership** is not for agency managers who want to be reassured they are doing everything right. You will be learning and implementing changes which have proven most beneficial to agents, companies and insurance consumers – changes that can shape your future.

Nationally recognized consultant **Mary Eisenhart Belka** will lead program participants through this process.

## WHAT YOU WILL RECEIVE

**Innovative Leadership** offers current and emerging agency leaders an opportunity to focus on their professional development and leadership skills, and help evolve their agencies to grow and develop the right environment for perpetuation during the coming years.

This year-long program is a blend of group sessions and activities, individualized executive coaching, as well as self-directed learning. **It is designed to ensure that you achieve results, develop your leadership skills, and move your agency forward.**

### The program will:

- Introduce **innovative tools for building your business**, enhancing team productivity, and growing your agency's value, including:
  - Building a strategic business plan
  - Creating and increasing agency value
  - Managing sales production
  - Managing operations and change
- Provide **leadership and networking opportunities** through IIAN industry initiatives.
  - Discovering your leadership style and the value of association leadership roles
  - Strengthening company relationships; joint planning
  - Understanding the big picture – the impact of regulation and politics on you and your agency

## SCHEDULE OF PROGRAM COMMITMENTS

### **May 8-9, 2017, Lincoln**

**2 Day "immersion" learning experience with Mary Eisenhart Belka**, at the IIAN Learning Center in Lincoln, for emerging leaders and agency managers – including lunches.

#### **The "building blocks":**

- Strategic Planning
- Sales and Marketing
- Goal setting
- Performance based compensation
- Automation
- Building a business model
- Plan implementation

**Emerging leaders and agency members will write and implement their agency business plan and report back during the course of the year.**

## **August 3, 2017, Mahoney State Park**

**1-Day on agency perpetuation, featuring agency valuation consultant John Dismukes and family-owned business transition expert Brad Burkland**

- Agency valuations
- Perpetuation soft skills
- Dealing with 1099 producers
- How to prepare for the process
- Perpetuation pitfalls
- Afternoon group consultation with Mary, John and Brad

## **October 10-11, 2017, Lincoln**

**2-Day attendance, learning and networking at IIAN's 110th Annual Convention** in Lincoln (convention registration fee included)

- Agency operations
- Carrier relationships and planning
- Human Relations
- Agency Leadership
- Seeing the big picture – association services and value to you and your agency
- Networking with experienced industry leaders

## **January 18-19, 2018, Lincoln**

**2-Day Advocacy Experience and Wrap-Up Session Day 1 – IIAN Day At The Unicameral, and Insurance Department Networking –** IIAN legislative issues briefing, luncheon at the Governor's Mansion with Senators, visit with Nebraska Insurance Director and Insurance Department managers.

- Seeing the big picture – the impact of politics and regulation on you

**Dinner with Mary to prepare for Day 2**

**Day 2 – “Putting It All Together” – Wrap-up session with Mary Eisenhart Belka**

- Case studies from present and past participants
- How to implement the ideas and concepts
- Making it happen – how to put your plan in motion

## **PROGRAM COACH**



**Mary Eisenhart Belka** has spent 30 years in the insurance industry, both in independent agencies and with insurance carriers. In 1996, she became an insurance industry consultant, and is the owner of Eisenhart Consulting Group, a consulting firm dedicated to helping insurance organizations become extraordinary.

A graduate of the University of Nebraska, Mary has continued her insurance education by earning the CPCU, ARM, ARe, RPLU, CIC, and CPIW designations. Mary has been featured in *Rough Notes* and other insurance industry publications, and has authored a Best Practices tool for IIABA, “The Next Generation: A Young Agent’s Best Practices Leadership Guide.” Mary develops and presents insurance industry management, technical, Best Practices, motivational, and risk management seminars throughout the U.S.

Agency valuation consultant **John Dismukes** and family-owned business transition expert **Brad Burkland** will join Mary and share their knowledge for the **August 3, 2017 agency perpetuation session.**



## PARTICIPANT SELECTION

The program is open to Nebraska agency principals and/or staff who are in an agency management position or have aspirations of assuming a leadership role. Participation by both an emerging agency leader and an agency manager is required. Class composition will be designed to represent as many agencies as possible with a mix of experience levels, expertise, agency sizes and geographical distribution.

Applicants must be members of IIAN and have been in the industry for a minimum of three (3) years. Participants will be selected for demonstrating that they are:

- Results-Oriented
- Thought Leaders
- Interested in Developing Professionally and Being Introduced to Best Practices
- Willing to Create Personal Goals
- Have the Ability to Commit Time

### **Attendance**

Full participation in the scheduled program days is essential to a successful experience. Attendance at all events is mandatory. Participants not adhering to the attendance requirements will be automatically dropped from the program with no portion of the tuition refunded.

### **Tuition**

Program tuition is \$1,500 for Emerging Leader, \$500 for Agency Manager/Mentor, and \$500 for each additional person from the same agency. Includes continental breakfast, lunches, and Annual Convention events/meals as indicated in the program schedule. Does not include transportation or lodging expenses.

### **Application**

If selected for the Class of 2017, your payment will be required by **April 10, 2017** to secure your spot. Space is limited!

Application must be received by March 31, 2017. Application and online payment is available now at [www.iian.org/innovativeleadership](http://www.iian.org/innovativeleadership)

“This program offers excellent information to agents and owners on all the many facets of running an independent insurance agency. The discussion will either make you feel good about where agency stands in today’s insurance industry, or it will make you quickly realize what your agency is lacking in order to stay competitive. **The program is like nothing else offered in our area and is certainly worth the investment.**”

*Zak Morken  
Sales Manager  
Western Insurors of Nebraska*

“We have been very fortunate to meet Mary through the Total Quality Agency (TQA) program delivered by the Michigan Association of Insurance Agents. **Our agency has been in business since 1931. Although we believe we run our business very successfully, we felt we would benefit from a wider perspective. We have come away from each session feeling energized, focused and empowered.** We have implemented many of the operational suggestions that Mary has shared and are moving forward more effectively, profitably and with a standard of care that this industry requires. She is highly invested in our industry, she stays on the cusp of all new developments and provides rich content of the operational necessities of successful agencies. Her knowledge and information provides a fertile ground for any agency’s success. She is inspirational excellence!”

*Leslie J. Payment, AAI, LIC, CISR  
Marketing Manager  
Klebba Agency, Inc.*