

AGENCY OPERATIONS – NO LIMITS!

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Leadership Focus – Context for Discussion

- Identify Topics & Questions from the Participants
- Average vs. Great – Differentiation Factors
- Clients first – Risk Management v. “Insurance”
- Sales Culture
- Best Operations Solutions are Often Counter-Intuitive

A Plea for Change – Survey Results from 250 Account Managers – Top Agency Operations Issues from AM Perspective

- Rate Increases/Pricing/Market Conditions/Time
- Staffing Issues
- Training
- Customer Service
- Technology

Possible Topics – Just a Beginning – In Case You Can’t Think of Anything!

- Remarketing & Other Addictions
- Perpetuation
- Technology ROI
- Performance-based Compensation
- Certificate Insights – There is a Better Way!
- Business Models that Work
- Recruiting
- 0 to 60 MPH – Straight-up Learning Curve Training/Education
- Producer Involvement in Servicing – Stop It!
- Profitable Small CL Production/Handling
- Increasing Revenues per Relationship – It Starts with Target Marketing
- Developing – and Sticking to – Target Client Parameters
- Recruiting is Great – But How Do You Get Them to Stay?
- Generational Realities
- What Does It Mean to Provide Structure for Gen-Z & Millennials?
- Old School, New Age
- The Value of Personality Testing

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- Organic Growth v. Buying Withering Agencies

Metrics – Becoming Your Own Consultant

- Growth – Profitability – Retention
- Setting Sales Goals
- Setting Operational Goals
- Producer Compensation
- Account Manager Compensation – Performance-based Approach
- ROI on Every Decision
 - ✓ Staffing
 - ✓ Technology
 - ✓ Carrier Relationships
 - ✓ Investment in Education

Connecting the Dots between Education & Application

- Building an Agency FAQ
- Lunch & Learn – Scenario Discussions
- Risk Management Questionnaires
- Moving Clients from Pre-loss to Post-loss Mentality

The Order of Things – Where Do I Start When It's a Hot Mess?

- Strategic Planning
- Financial Acumen – Know Your Numbers – What Are the Basics?
 - ✓ Revenue Handled per Employee
 - ✓ Average Revenue per Relationship
 - ✓ Policies per Relationship
 - ✓ Retention
 - ✓ New Business Production (Revenues, not Premium)
 - ✓ Alignment of Goals with all Else
 - ✓ Target – Focus – Stop Being All Things to All People
- Business Model
 - ✓ Leadership – Sales, Financial, Operations
 - ✓ Segmentation
 - ✓ Flat is Better
- Staffing
- Tech Stack
- Procedures
- Auditing

Wrapping It Up