

Dramatically Improve your Organization's
Short Term Results and Long Term Growth!

The One Page Business Plan[®] for Field Leaders



An Interactive Field Leadership Business
Planning and Implementation Process for:

- ✓ Distribution Leadership Teams
- ✓ Graduates of GAMA's Essentials Program
- ✓ GAMA's Leaders of Today and Tomorrow (LOTT)
- ✓ Striving First Line Leaders
- ✓ High Potential Front Line Leaders

Create a Results-Oriented Blueprint for Leadership and Sales Success... On a Single Page!

- ✓ Walk away with a specific plan on how to achieve top business results... now!
- ✓ Develop a clear vision for your business that will energize everyone on your team.
- ✓ Craft a set of strategies that define how you are going to grow your business this year... and beyond.
- ✓ Create a set of goals that will help you lead your team to greater heights going forward!
- ✓ Define a mission critical timetable for producing more predictable results.

Portland Insurance Agency
Tom Robinson, Managing Director
FY2009 Consolidated Plan

vision
Within the next three years grow the Greater Portland Insurance Agency into a \$15 million agency system with three locations providing auto, property & casualty, life insurance and financial services to individuals, families and businesses that are concerned about being protected from the unpleasant and unexpected events of life.

mission
Prepare and Protect the Families and Businesses in our community!

objectives

- Increase total revenue from \$8 to \$10 million in FY2009.
- Add 2,000 new policies in 2009 generating \$1.2 million in incremental revenue.
- Increase average annual premium from \$500 to \$550.
- Increase client retention rate from 88.35% to 91%.
- Increase # of average appointments per agent from 1.9 to 5 per week by April 30th.
- Increase close rate from 25% to 50% by June 30th.
- Increase life insurance referrals from 2 to 5 per week per agent.
- Hire 5 new agents by April 1st, additional 7 new agents by October 1st.

strategies

- Become locally known for excellence in "family & business insurance solutions".
- Build long term relationships w/ prominent bus. leaders - create consistent referral source.
- Maximize visibility by serving on community, non-profit, & professional boards.
- Mine existing client base for "A" clients; use seminar marketing system to find "B" clients.
- Strategic Mktg Alliances - align w/ CPA's, attys, auto dealers, real estate profs.
- Sell thru education; use computer presentations to assure consistent message delivery.
- Staffing - hire professionals, provide quality training, 1:1 mentoring, reward Winners.
- Streamline all internal support & admin functions thru effective & smart use of technology.

action plans

- Implement agent incentive reward plan Jan. 15, 2009.
- Kickoff new agent search/hire process Feb. 1st; Training to begin April 15th.
- Contribute 1 article/month to Oregonian & Portland Tribune newspapers beginning Feb. 1st.
- Develop strat. relationship/co-op mktg program w/ major CPA firm & Law firm beg. 5/1.
- Conduct Credit Union member estate planning workshops every 8 weeks starting July 1st.
- Launch "Help a Non-Profit" initiative Sept. 30th.
- Re-launch High School Financial Program Oct. 1st.
- Move to new Portland Financial Center Nov. 1st.

"The One Page Business Plan process is like none other I have experienced. Our leadership team participated, with each one designing their own plan. The result being each leader is engaged, empowered and has ownership of a plan with his/her best thinking. I highly endorse One Page Business Plan."

Bob Fashano CLU, CHFS, MSFS
General Agent - The Guardian, Master Agency

