



BEST PRACTICES IMPLEMENTATION TABLE

BEST PRACTICES RESOURCES

All Best Practices products can be purchased through IIABA unless otherwise noted. Be sure to visit the Best Practices Gateway, your online portal to an abundance of Best Practices resources! While online you can order Best Practices products, compare your agency to the "best of the best" via interactive quick checks, read sections from selected Best Practices tools and much more. Visit www.independentagent.com, select "Best Practices" from the "Member Resources" drop down menu for available resources. If you have any questions please call IIABA's Education Department at (800) 221-7917.

THREE WAYS TO ORDER

- ❶ **E-Book Download** visit www.independentagent.com, select "Best Practices" from the "Member Resources" drop down menu, and select "Order Form". Select the desired product title to access the link to purchase and download immediately. Just point, click, purchase and download to your computer!
- ❷ **Mail** completed order form and payment to: IIABA Education Department; 127 South Peyton Street; Alexandria, VA; 22314
- ❸ **Fax** completed order and payment information to: IIABA Education Department; 703-683-7556

| If you want to... | The best product to choose is..... | What you can expect from this product is... |
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| Obtain an Associate in Insurance Production Designation | <i>Elite Force Sales Training Program</i> | Covers everything an insurance producer needs to know, from prospecting, negotiation skills, time management, consultative relationship building, building credibility, data gathering, and closing while reviewing several different popular sales techniques. Attend 12 days of classes (three days per quarter) adhere to the "written" requirements of the program (goal setting and monthly reporting) and earn the Associate in Insurance Production (AIP) designation administered through IIABA. This new sales school is offered through a several IIABA state associations and through the National Association. <i>For more information contact Jennifer Becker (Jennifer.Becker@iiba.net) or your local IIABA state association.</i> |
| Find out what the best agencies in the country are doing to achieve superior results | <i>2009 Best Practices Study Update</i> | In order to accurately gauge your agency's performance in today's highly competitive and volatile business environment, you need to know what the best agencies are doing to survive and thrive. The <i>Best Practices Study</i> was designed to identify new ways for agencies to grow, increase profitability and stability, perpetuate ownership and operations, and enhance viability and value through an analysis of selected Best Practices agencies. The <i>2009 Best Practices Study Update</i> provides up-to-date benchmarking figures for the 2007 <i>Best Practices Study</i> along with a current analysis of the financial and operating results of these Best Practices agencies. <i>Price: \$99.95 Hardcopy/\$59.95 Electronic</i> |
| | Introduction to Best Practices Seminar | This 3-hour seminar reviews both anecdotal and numerical findings of the Best Practices Study and its updates. <i>Contact your state association for more information.</i> |

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| Develop a step-by-step business recovery plan in the event your agency experiences a disaster | <i>Best Practices of Crisis Management</i> | A CD designed to enable you to create an in-house, fully customized plan to lead your agency through the recovery process. <i>Price: \$99.95 Electronic Only</i> |
| Take a proactive approach in analyzing and improving agency performance | <i>Interactive Agency Self-Diagnostic Tool</i> | An interactive tool designed to help agency owners and principals take a step-by-step proactive approach to overall agency efficiency, profitability and management. This tool provides the information and resources needed to evaluate current agency performance, identify strengths and weaknesses through checklists, worksheets and case studies which will help in the development of an action plan specific to your agency's needs and expectations. <i>Price: \$129.95 Electronic Only</i> |
| | <i>Agency Self-Diagnostic Quick Check</i> | A simple test of an agency's growth, stability, profitability, and financial management. Provides an immediate overview of agencies' strengths and weaknesses. <i>Price: \$0.35 each (min. 25)</i> |
| | <i>Agency Performance Analysis (APA)</i> | An automated analysis of agency operating results. <i>To order call Reagan Consulting at 404-233-5545.</i> |
| Recruit, hire, and train the best producers for your agency | <i>Top Producers: Discover, Train, Reward</i> | This guide not only leads you through the steps to finding great producers but also how to hire, train, compensate, and manage them. Includes the <i>Guide to Producer Contracts</i> (a \$29.95 value) and <i>Sales Potential Quick Check FREE!</i> <i>Price: \$89.95 Hardcopy/\$69.95 Electronic</i> |
| | <i>Guide to Producer Contracts</i> | The maze of legal jargon contained in producer contracts is explained in this concise guide. Contains sample contracts making it a must have for principals, agency managers, and their attorneys. <i>Price: \$29.95</i> |
| | Recruiting, Developing and Motivating New Producers Seminar | Designed to navigate through the steps of recruiting, developing and motivating new producers, this seminar helps identify the costs and benefits of adding a new producer as well as many other critical factors. <i>Contact your state association for more information.</i> |
| Explore how other agencies are utilizing technology | Making Technology Work for You Seminar | Designed to guide you through the latest technology trends, myths, and themes with real life case studies and survey results. Demonstrates the real purpose of technology – to generate revenues! <i>Contact your state association for more information.</i> |

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| Learn how to enhance service to retain customers | <i>Customer Service Made Simple – An independent agent's guide to superior customer service</i> | Lists priorities and tactics to help you set and achieve your customer service goals. Learn how to lead your team to better evaluate customer feedback, increase the number of policies written, and significantly improve account retention and development. <i>Price: \$29.95 Hardcopy/\$19.95 Electronic</i> |
| | <i>The Quality Journey</i> | A seven-page checklist to evaluate an agency's current ability to provide quality customer service. <i>Price: \$0.50 each (min. 25)</i> |
| | Achieving Quality Customer Service Seminar | A workshop teaching techniques for making customer service part of the agency culture. <i>Contact your state association for more information.</i> |
| To create more productive partnerships by sharing information and planning responsibilities with the carriers your represent. | Joint Planning Tool <i>Quick Step</i> | The <i>Joint Planning Tool Quick Step</i> was designed to facilitate this critical planning. Developed jointly by agents and companies in partnership with IIABA's Council for Best Practices, this easy to use Excel spreadsheet is designed to help you establish and monitor your collaborative planning relationships with your insurance partners. <i>Price: \$ 79.95/Electronically Only (Licensed version is available for companies</i> Contact: Jennifer Becker Email: Jennifer.Becker@iiaba.net) |
| Enhance agency/company relationships and improve results | Joint Agency/Company Planning Seminar | A 3-hour session revealing the rationale behind the guidelines and information needed to complete companies' various forms. <i>Contact your state association for more information.</i> |
| Investigate new skills, approaches, and management practices to improve the agency sales environment | <i>Best Practices of the Leading Sales Organizations in the United States</i> | An analysis of the business philosophies, strategies, and practices of some of the leading sales organizations in the U.S. <i>Price: \$20</i> |
| | Best Practices for Creating a Sales Organization Seminar | A 3-hour overview of the <i>Best Practices of the Leading Sales Organizations in the United States</i> . The seminar provides a roadmap for establishing a sales culture for building a strong sales organization. <i>Contact your state association for more information.</i> |
| Make plans for the perpetuation of your agency <i>(Continued)</i> Make plans for the perpetuation of your agency | <i>The Practical Agency Planner</i> | Strive for success, profitability, and a secure retirement with confidence by increasing profits through tax savings, planning for perpetuation, and adding significantly to the potential sales price of your agency. <i>Price: \$79.95</i> |
| | <i>Best Practices in Business Perpetuation & Management Succession</i> | This study provides motivation and useful information to independent agents who are currently or will soon be addressing the issue of business perpetuation. <i>Price: \$19.95 Electronic</i> |
| | Best Practices in Business Perpetuation & Management Succession Seminar | A 3-hour session that discusses the challenges and issues that privately-held businesses face regarding perpetuation of ownership and succession of management. <i>Contact your state association for more information.</i> |

