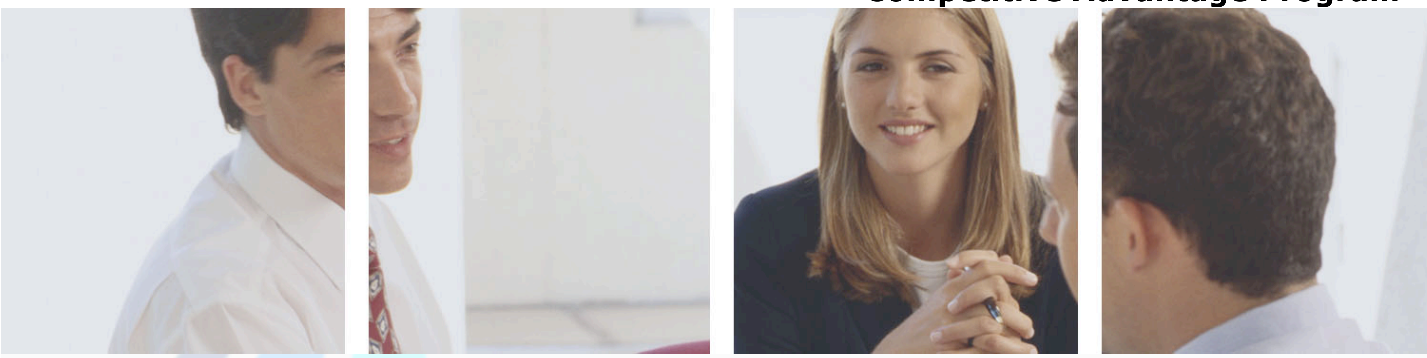
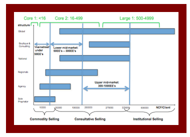
Competitive Advantage Program



Workshop Curriculum



Session 1: “The Big Picture: Segmentation within the Retail Insurance Broking Environment”

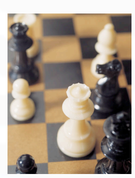
Course Description: An overview of the retail insurance broking distribution channel and its fundamental segments, prevailing client footprints within each segment, prevalence of commodity vs. consultative transactions, reasons for account movement between segments, trends in human capital migrations and key enterprise concerns.

“This session will help participants gain deeper insight into the different segments enabling them to better identify ‘high potential’ broker partners and where to spend their time more efficiently.”

Session 2: “Agency Growth Dynamics”

Course Description: Examination of growth strategies employed by retail insurance brokerages, attributes used in measuring growth, the ‘4-CORE’ best practice areas used by agencies, key metrics and ratios, cross selling dynamics, how ‘agents of change’ lead to new opportunities.

“Participants will learn enterprise level growth agendas of their constituent broker partners. This module will reveal ways to engage broker partners at the strategic level and become viewed more as a business partner to the concern.”



Session 3: “Operational Structures and Key Leadership Concerns”

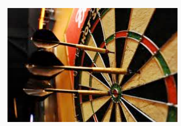
Course Description: Identification of key stakeholder concerns and common objectives for their respective roles. Examination includes both roles within mature corporate structures as well as by revenue segments.

“Attendees will learn key concerns and interests of different stakeholders within brokerages enabling them to more effectively communicate ideas for new sales initiatives featuring their products and services.”

Session 4: "Producers"

Course Description: Discussion and examination of tenure classes and key attributes and properties of each, principles of book building, and 'the Ten Most Common Mistakes Producers Make."

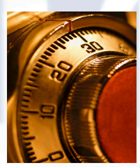
"Participants will gain insight into how they can work with individual producers more effectively by understanding fundamental book building economics as well as how industry tenure can reveal opportunities for growth within their broker constituency."



Session 5: "Identifying and Approaching 'High Potential' Targets"

Course Description: This session will focus on identifying 'high potential' brokerages for representatives and how to align their messaging and work methodology around key enterprise level objectives.

"Participants will gain insight into where the 'high potential' brokerages reside within their territories and learn best practice methodologies for approaching leaders within those concerns about new sales initiatives."



Session 6: "The Strategic Engagement Plan (SEP)"

Course Description: This session will focus on constructing 'strategic engagement plans' for 'high potential' brokerages that will incorporate and organize key activities throughout the year that representatives can use to develop these relationships to their full potential.

"Participants will learn how to construct yearly 'game-plans' with their brokerage partners that will help them engage more effectively resulting in more business being written with less time and expense."

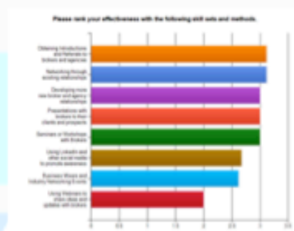
Session 7: "Tactical Execution of the Strategic Engagement Plan"

Course Description: Identifying the 'gaps' that must be filled in order to make tactical execution possible with strategic sales programs, the uses of key tools and best practice specimens that can be applied in the field by their broker partners to win business.

"Representatives will be shown several of the most common 'gaps' among producer resources and skill sets that can be easily filled in order to help them gain more results with their products and services.

5 Discussion Exercises

5 Group Activity Exercises



Review of Diagnostic Responses from Attendees

Tools & Specimens to Help your Brokers

About David E. Estrada

David began his insurance career with The Guardian Life Insurance Company of America in 1984. During his career he has amassed an amazing record of success in over two decades of service as a retail employee benefits producer in both mid-market and large market business. He has consistently achieved top sales awards throughout his career, including the Exceptional Producer Council Award recognizing him in the top 3% of all producers within Willis' North American Retail Division. David's leadership experience includes practice group and sales leadership roles for both regional and global brokers, and is formerly the Regional CEO for USI Holdings in Northern California. David is now the Managing Director of Rainmaker Advisory LLC, a Portland Oregon based consultancy dedicated to improving sales and operational excellence within the retail insurance broking sector. David is a nationally recognized industry thought leader, author and speaker, is a graduate of Santa Clara University, and currently resides in Portland Oregon.

About Rainmaker Advisory LLC

Rainmaker Advisory LLC is a results oriented sales and operations consulting firm specializing in the retail insurance broking sector. Founded in 2008, Rainmaker has relationships with over 7800 insurance agencies and brokerages nationwide. With offices in Oregon, California, New York, and New Hampshire, Rainmaker Advisory LLC is a leading provider of the tools, resources and vendor partners necessary for successfully growing retail insurance broking organizations on a sustainable basis.

For more information please visit:

www.rainmakeradvisory.com

or contact us at:

mailto:info@rainmakeradvisory.com