



David has helped us be a more efficient agency. Our plans are more calculated, we have goals and know how to reach them. Overall, we are all learning to work smarter, not harder.

HANNAH CAVEY CALLIHAN
NORTH CENTRAL INSURANCE AGENCY



CLIENT PROFILE

North Central Insurance Agency (NCIA) is a family-owned insurance provider with more than 30 years of success. David Cavey, President, took the reigns from his father and company founder, Gene Cavey in 1984. He grew the business rapidly by acquiring several agencies into the North Central family. In 2014, Vice President, Hannah Cavey Callihan, joined the family business with a goal of further expanding the agency and finding new ways to be competitive in the industry. NCIA provides a unique approach to insurance, because they have binding authority with multiple providers. Located in Parkton, Maryland, their primary focus is to provide outstanding customer service and build trusting relationships with their clients — above and beyond a traditional insurance contract.

CLIENT CHALLENGE

Having a successful family-owned business is not without its challenges. The past several years the company experienced relatively flat growth. “Each year we were gaining new customers but losing just as many, which was really frustrating,” said Hannah. “So I tried to find new ways to be innovative and increase accounts,” she said. “We needed a different way to think about our business, because the industry in general has changed so much,” she added. That’s when they sought out David Kelly and the Growth Solutions Team. Immediately, Kelly recognized that both Cavey and Callihan had a significant amount of “clutter” that could be delegated to other team members. Additionally, Kelly helped them evaluate their organization and identify referral sources that would generate new business. The Growth Solutions Team quickly put them on track to dedicate time in niche markets like farms and network smarter.

RECOMMENDATIONS & SOLUTIONS

PHASE 1: SALES & BUSINESS DEVELOPMENT

- Establish a target demographic of clients and referral partners
- Create a contact marketing campaign to build relationships
- Develop an effective value message and value delivery process
- Utilize a sales process for conversations leading to new client acquisition
- Build a network of referral partners who send business (insured)
- Qualify potential referral partners (Realtors, Lenders, CPAs, Bankers & Attorneys) to focus the most time on individuals with the best capacity to refer clients

PHASE 2: RECRUIT/HIRE PRODUCER

- Recruiting for Insurance Producer
- Interview and evaluate the potential of applicants
- Offer and negotiate employee agreement
- Negotiations and gaining agreement
- Successful on-boarding and 90-day initial period

RECOMMENDATIONS & SOLUTIONS CONTINUED

PHASE 3: RECRUITING AND ACQUISITION

- Identify future key positions for team
- Recruit additional Producers and CSRs to team
- Delegate responsibilities from Owners to key team members
- Create internal processes for each position
- Identify potential agency acquisitions

RESULTS

Working with the Growth Solutions Team has helped the agency become more organized and efficient. GCGB has helped them prioritize and see that their actions need to have value assigned to increase business, not add busywork. One priority that the Growth Solutions Team helped North Central Insurance Agency do was establish a network of QUALITY referral partners. "We're networking more efficiently now, not necessarily more often. Our meetings with referral partners and networking events are meaningful and they're generating business," said Callihan. Their solid base of referral partners generate business.

PHASE 1: SALES & BUSINESS DEVELOPMENT

- NCIA has doubled the number of qualified referral partners
- Created a contact marketing campaign which facilitates referral relationships
- Increased business sales and overall revenue by 15%

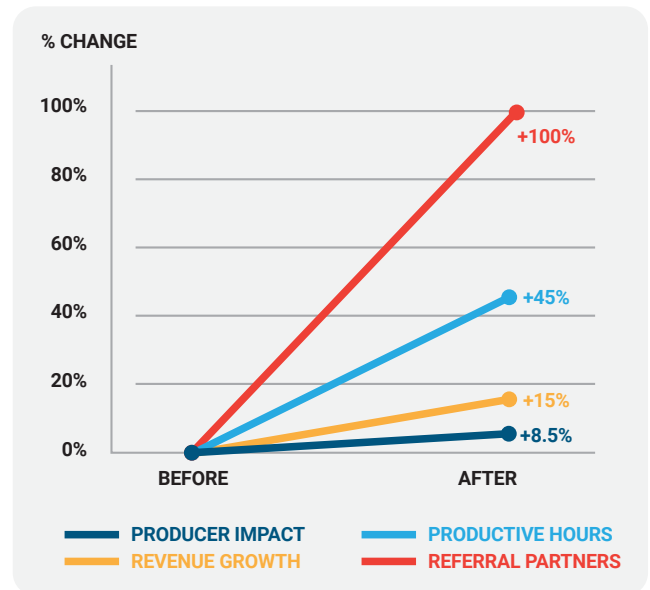
PHASE 2: RECRUIT/HIRE PRODUCER

- The addition of a Producer has contributed to an 8.5% increase in revenue
- Producer is exceeding expectations, and NCIA is looking to hire a second

PHASE 3: RECRUITING AND ACQUISITION

- Organizing, prioritizing and delegating tasks has saved HOURS of time for both David and Hannah. Together they estimate a 45% increase in productive hours.
- Actively pursuing acquisition of an agency
 - Identified characteristics of target agency
 - Hired a firm to assist with the acquisition

The Growth Solutions Team helped breathe new life into North Central Insurance Agency, and has been pivotal in providing everything from advice on industry trends, being a sounding board for ideas, to providing guidance for increasing business. "David Kelly and the Growth Solutions Team will help you approach each day differently. We have a new mantra – 'IS THIS WHAT MY BUSINESS NEEDS ME TO BE DOING?' He has truly changed the way we look at our business," Callihan remarked.



READY TO LEARN MORE?

Mid-Atlantic Office: 443.501.2201

Central Kentucky Office: 859.559.0100

office@GSTeammail.com

GrowthSolutionsTeam.com

