

— PRIVATE & CONFIDENTIAL —



## **PARTNERSHIP APPLICATION**

Agency Growth Mastermind groups are best practices peer-to-peer exchange groups for benefits agency leaders. The Mastermind is focused exclusively on implementing reinvention strategies to effect a reform-proof 21<sup>st</sup> Century Agency business model in 12 months.

Partnership is selective and offered to only agencies strongly committed to the reinvention process. To be considered for partnership, please complete the following application **IN FULL** and in strictest confidence and return to:

**Elizabeth Durrett**  
**Fax: (866) 489-5632**  
info@insurancebottomline.com

## **FIRM INFORMATION**

Business Name: \_\_\_\_\_  
Business Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ ST: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Website: \_\_\_\_\_

## **FIRM MAIN CONTACT INFORMATION**

*Please provide information for the person who will be our main contact for your organization. This person should be a firm principal or executive-level manager. The main contact will be the primary user of our online services and the attendee at the Summit conferences.*

Name: \_\_\_\_\_ Title/Position: \_\_\_\_\_  
Direct Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Address (if different): \_\_\_\_\_ City, ST, Zip (if different) \_\_\_\_\_

*Please answer the following questions honestly in the space provided. If you don't know the answer, make an educated guess, or if you have no idea, just write "I don't know."*

## **BUSINESS EXPERIENCE, SERVICE & STRUCTURE**

1) How many years has your agency been in business? \_\_\_\_\_

2) Does your firm have branch offices: Yes \_\_\_\_\_ # \_\_\_\_\_ No \_\_\_\_\_

3) Outline your business history, experiences, successes and lessons:

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4) Total number of full-time employees: \_\_\_\_\_

Total number of full-time group producers: \_\_\_\_\_

5) How do you describe your current business offerings to your prospects & clients?

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6) Please list any niche or specialty markets:

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# **CONFIDENTIAL COMPANY REVENUES & PROJECTIONS**

7) Regarding company revenue & profit over the last three years, what has been:

	2010	2011	2012 (projected)
Your total revenue?	\$ _____	\$ _____	\$ _____
Commission revenue?	\$ _____	\$ _____	\$ _____
Overall gross profit?	\$ _____	\$ _____	\$ _____
Net profit?	\$ _____	\$ _____	\$ _____

What percent of your agency's revenue is made up of each of these categories?

Group Benefits \_\_\_\_\_%    Worksite Voluntary \_\_\_\_\_%    Retirement \_\_\_\_\_%

Executive Benefits \_\_\_\_\_%    Individual Health \_\_\_\_\_%    P&C \_\_\_\_\_%

Other \_\_\_\_\_% Describe: \_\_\_\_\_

## **THE OPPORTUNITY AHEAD FOR YOU**

8) What are your biggest concerns about the impact of PPACA, industry changes, etc.?

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9) Do you have a specific, written "Ideal Client" description & profile? YES \_\_\_\_\_ NO \_\_\_\_\_

10) What marketing & prospecting strategies do you now employ for lead generation?

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11) How would you describe the success of these strategies?

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12) What percentage of your revenue is derived from cross-selling efforts? \_\_\_\_\_%

13) Please describe the key strategies your firm's sales management uses in the areas of:

A. Recruiting and hiring

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B. Holding producers accountable for results

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C. Providing ongoing professional sales training and development

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14) Do your producers use a standardized consultative selling approach? YES \_\_\_\_ NO \_\_\_\_

If YES, briefly describe and list the key elements of that process:

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15) What technologies and tools currently does your firm use to operate more efficiently and effectively? (e.g., CRM, agency automation system, email auto responder):

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16) Do you have an effective system in place to consistently track & measure results of your sales and marketing activities? YES \_\_\_\_ NO \_\_\_\_

If YES, please provide your results for the following key metrics:

Sales conversion rate = \_\_\_\_\_%

Cost per lead = \$ \_\_\_\_\_

Cost per sale = \$ \_\_\_\_\_

Avg. Marketing ROI ratio = \_\_\_\_\_ to 1

**YOUR PERSONAL SCHEDULE**

17) Please answer the following in terms of your personal work schedule:

- Number of hours you work (at the office & home), average week \_\_\_\_\_
- Number of hours you'd prefer to work, average week \_\_\_\_\_
- Percentage of your work time you rank as productive \_\_\_\_\_
- Number of hours per week you work "on" vs. "in" your business \_\_\_\_\_
- Number of weeks of vacation taken            2010: \_\_\_\_\_    2011: \_\_\_\_\_    2012: \_\_\_\_\_
- Number of weeks of vacation you'd prefer taking \_\_\_\_\_

**CONFIDENTIAL SELF-ASSESSMENT**

18) Please answer the following by ranking each item 1=Poor to 5=Damned Near Perfect:

- Advertising & marketing skills ..... \_\_\_\_\_
- Sales skills ..... \_\_\_\_\_
- Time allocated to marketing & sales ..... \_\_\_\_\_
- Autonomy (able to do business on your own terms) ..... \_\_\_\_\_
- Discretion in selecting opportunities ..... \_\_\_\_\_
- Tough-mindedness ..... \_\_\_\_\_
- Satisfaction with income & income growth ..... \_\_\_\_\_
- Satisfaction with wealth & wealth growth ..... \_\_\_\_\_
- Satisfaction with time allocation to biz, to personal ..... \_\_\_\_\_
- Agility: anticipation of change, active embrace of change ..... \_\_\_\_\_
- Control of business & life ..... \_\_\_\_\_
- People you associate with ..... \_\_\_\_\_
- People you rely on ..... \_\_\_\_\_
- Year to year improvements, in toto ..... \_\_\_\_\_
- Ability to influence others ..... \_\_\_\_\_

**INTEREST IN THE AGENCY GROWTH MASTERMIND**

19) Tell us, briefly, why you are interested in becoming an Agency Growth Mastermind Partner?

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## **CONFIRMATION**

I hereby warrant that the information I have provided on this Application is accurate to the best of my knowledge.

I understand that Partnership in the Agency Growth Mastermind program is on a first-come basis and that my application will hold my spot for 10 business days from the date of this application. I also understand that this application does not obligate my participation in the program.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Title

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# AGENCY GROWTH MASTERMIND

## Your Firm Reinvented into a Reform-Proof 21<sup>st</sup> Century Agency in 12 Months

Plug into the industry's only intentional, structured program for guided agency reinvention, based on the 21<sup>st</sup> Century Agency business model, incorporating a peer-exchange mastermind for best practices and peer accountability and driven by a specific timeline to ensure completion in just 12 months

- **Personalized Reinvention Curriculum and Implementation Timeline**
  - On joining AGMN, a personal on-site leadership consulting session with AGMN directors Nelson Griswold or Scott Cantrell
  - Personalized agency reinvention plan developed for you based on your firm's specific needs
  - Customized 12-month implementation timeline to reflect your agency-specific reinvention goals & priorities
- **Four 3-Day Mastermind Summit Events**
  - Live mastermind sessions personally facilitated by Nelson & Scott to provide you reinvention best practices, problem solving, encouragement and peer accountability
  - In-depth workshops on reinvention topics by our team of leading industry experts
  - Access to Nelson, Scott and our experts for one-on-one coaching sessions
  - Luxury locations & amenities
- **Monthly Mastermind Conference Calls**
  - Personally facilitated by Nelson & Scott
  - Group coaching by Nelson, Scott & guest experts
  - Member "Hot Seats" to focus on each member's reinvention process
- **Monthly Online Executive Briefings**

In-depth learning sessions presented by industry experts on reinvention topics in the key areas of Portfolio, Selling, Marketing & Management
- **Private One-On-One Consultation**

Two hours of personal consultation with Nelson & Scott on any issues you need help with
- **Custom and Done-For-You Tools & Resources**

Ready-to-use tools and resources such as done-for-you marketing tools, management templates and checklists, and training programs for consultative selling & cross-selling to facilitate your reinvention process and reduce the learning curve
- **Online Reinvention Resource Portal and Mastermind Forum**

Exclusive access to a wide array of reinvention resources, including audio recordings of all Mastermind sessions, workshops, executive briefings, etc.
- **Regular Stream of Reinvention Insights, Tips & Shortcuts**

Weekly emails and faxes with best practices & the best thinking from Nelson, Scott and our team of industry experts