
MASTERING AGENCY MANAGEMENT

In partnership with:



Lead Smart. Run Smooth. Build Legacy.



PROGRAM OVERVIEW





IN-PERSON EXPERIENCE SUMMARY

Program Structure

An engaging and results-driven three-day program with seven modules designed to strengthen leadership, boost performance, and drive agency growth.

Coaching Sessions

Individual coaching between sessions reinforces classroom concepts and is tailored to your specific areas of growth.

Actionable Outcomes

Reflective exercises at the close of each module encourage practical application and continuous improvement in your day-to-day work.

Final Deliverables

Participants create a customized Talent Enhancement Plan and Legacy Statement to shape their leadership impact and serve as a roadmap for professional growth.

DAY ONE: STRATEGIC FOUNDATIONS



MODULE 1: OPTIMIZING INSURANCE OPPORTUNITIES

Optimizing Your Insurance Portfolio

Master the art of balancing your book of business while applying sound risk management strategies to strengthen agency performance.

Building Strategic Partnerships

Learn how to build and leverage industry relationships that enhance your agency's market position and open doors to new opportunities.

Reducing Acquisition and Merger Risks

Gain insights into identifying and minimizing risks during agency acquisitions or mergers to ensure smoother transitions and long-term success.

Planning for Ownership Transition

Create a proactive transition strategy that preserves agency continuity, supports leadership succession, and promotes future growth.



MODULE 2: ELEVATING THE SALES PROCESS

Setting and Tracking Sales Goals

Apply principles of behavioral economics to set clear, measurable sales goals and monitor progress to drive consistent performance.

Sales Coaching for Team Success

Design targeted sales plans and coach your team to sharpen skills, boost confidence, and close more deals effectively.

Recruiting and Retaining Top Talent

Learn strategies to attract high-performing sales professionals and manage turnover to build a stable, results-driven team.

Measuring and Building Team Resilience

Discover practical methods to assess team grit and foster a resilient, high-performance sales culture that sustains long-term success.

DAY TWO: OPERATIONAL EXCELLENCE



MODULE 3: STRENGTHENING INTERNAL COMMUNICATIONS

Mastering Interpersonal Communication

Discover techniques to enhance communication across your agency, fostering transparency, collaboration, and trust.

Driving Performance Through Coaching

Learn effective coaching strategies that support employee development, boost engagement, and elevate overall performance.

Leading with Ethics and Trust

Explore how ethical leadership builds trust, strengthens culture, and creates a foundation for long-term agency success.

Balancing Flexibility with Operational Consistency

Understand how to maintain efficiency and morale by striking the right balance between adaptable practices and consistent processes.



MODULE 4: STREAMLINING AGENCY OPERATIONS

Streamlining Internal Operations

Improve core processes to boost agency efficiency, reduce friction, and support scalable growth.

Navigating Legal and Policy Frameworks

Understand key legal requirements and design policies that align with your agency's goals and regulatory obligations.

Compensation and Staffing Strategies

Explore effective hiring practices, compensation models, and benefits planning to foster a strong, positive workplace culture.

Driving Operational Improvement Through Reflection

Identify and implement targeted procedural enhancements that optimize day-to-day agency operations.

DAY THREE: GROWTH & INTEGRATION



MODULE 5: UNLOCKING FINANCIAL POTENTIAL

Financial Tools and Planning Strategies

Learn to use balance sheets, break-even analysis, and budgeting techniques to strengthen your agency's financial planning and decision-making.

Building a Strategic Business Plan

Develop a comprehensive business plan that guides agency growth, supports strategic choices, and aligns with long-term goals.

Optimizing Compensation Models

Explore various compensation structures to improve profitability, motivate staff, and support a healthy agency culture.

Enhancing Financial Literacy for Better Decisions

Boost your financial literacy to make confident, informed decisions that drive sustainable agency success.



MODULE 6: BUILDING EXTERNAL RELATIONSHIPS

Strengthening Carrier Relationships

Discover strategies to deepen connections with insurance carriers, enhancing agency reliability and growth potential.

Evaluating Strategic Acquisition Opportunities

Learn how to assess potential acquisitions to expand your agency's capabilities, market reach, and long-term value.

Community Engagement for Brand Impact

Implement practical approaches to connect with your local community, fostering mutual support and increasing brand visibility.

Forming High-Impact Strategic Partnerships

Collaborate with industry organizations, financial institutions, competitors, and aggregators to broaden your agency's influence and opportunities.



MODULE 7: INTEGRATION & ACTION PLANNING

Integrating Key Concepts

Synthesize insights from across the program into a cohesive understanding that supports confident, informed leadership.

Strategic Action Planning

Create a personalized, actionable plan to apply core takeaways and elevate your agency's performance.

Legacy Statement Creation

Define your leadership philosophy and agency vision through a thoughtfully crafted Legacy Statement.

Capstone Commitment to Growth

Conclude the program with a clear strategy for transformation, reinforcing your commitment to ongoing development and success.



INSURANCE EXPERIENCED COACHES TAILORED TO YOUR NEEDS:

Sales Strategy & Closing Coach

Refine your sales process, and implement best practices for prospecting, closing, and client retention. A coach helps you set goals, track progress, and overcome challenges to achieve consistent growth.

Office Operations Coach

Optimize daily processes like client onboarding, policy serving, and staff coordination – enhancing the customer experience and ensuring your agency runs smoothly and profitably.

Financial Planning Coach

Gain clarity and control over your agency's financial health. Make time for budgeting, forecasting, and setting financial goals. Understand key metrics like cash flow, profitability and expense management. With support, you can make informed decisions, improve long-term sustainability, and build a more financially resilient agency.

Staffing & Talent Management Coach

Make sure you are recruiting the right people, developing staff capabilities, and creating a culture of accountability and engagement. With guidance, you can improve retention, align roles with strengths, and foster leadership within your agency – ensuring your team is equipped to grow with your business.

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START BUILDING YOUR LEGACY TODAY!

Why choose this program?

- **Credibility:** Facilitated by experts with 25+ years of leadership development and executive coaching experience in the insurance industry.
- **Practicality:** Apply proven concepts immediately—at home that evening and at work the next morning.
- **Workability:** Sessions are spaced a few weeks apart to minimize time away from home or office.
- **Proven:** Our proven approach is so effective that the largest P&C insurer in Kentucky requires completion of our programs to apply for an agency manager position.
- **Partnership:** As a company partner of the **Ohio Insurance Agents Association (OIA)**, we're bringing this opportunity to you. All sessions are at **OIA's** Home Office. Financial assistance may be available for OIA members.



START BUILDING YOUR LEGACY TODAY!

What you'll gain:

Participants consistently report immediate, measurable improvements:

- Increased sales and stronger closing ratios
- Hiring and retaining top talent
- Smarter, more strategic business decisions
- Reduced employee issues and improved team dynamics
- Long-term industry partnerships that fuel growth.



START BUILDING YOUR LEGACY TODAY!

Your experience includes:

- **Three full days** of face-to-face learning with industry experts and peers
- **Three personalized executive coaching sessions** to help you implement powerful ideas
- **Small class size** for maximum engagement—limited to 20 professionals
- The satisfaction of investing in yourself and your agency's future



START BUILDING YOUR LEGACY TODAY!

Program Schedule

All sessions run 9:00 AM–4:00 PM EST

Day One – TBD

- Module 1: Optimizing Insurance Opportunities
- Module 2: Elevating the Sales Process

Day Two – TBD

- Module 3: Strengthening Internal Communications
- Module 4: Streamlining Agency Operations

Day Three – TBD

- Module 5: Unlocking Financial Potential
- Module 6: Building External Relationships
- Module 7: Integration & Action Planning

Location: Ohio Insurance Agents Association, 4266 Tuller Rd, Dublin, OH 43017



START BUILDING YOUR LEGACY TODAY!

Your investment:

- Enroll by TBD and save 10%:
\$2,160 for the first participant • \$1,800 for each additional attendee
- After TBD:
\$2,400 for the first participant • \$2,000 for each additional attendee
- Financial Assistance may be available for OIA Members through the Ohio Insurance Agents Foundation For The Advancement of Insurance Professionals: - <https://ohioinsuranceagents.com/agent-resources/foundation/>
- Flexible payment options available.

Register Here: <https://square.link/u/4w0mZMN3>

If registering 2 people from your agency enter code: MAM-2 at checkout to apply the discount

To Find Out More:

- Call: 317-253-7847
- Email: rdcripe@equisconsulting.com
- Online: <https://equisconsulting.com/mastering-agency-management/>

REFERENCE FOR EQUIS CONSULTING

It is with great enthusiasm that I provide this reference for Equis Consulting. Partnering with Equis has added an unparalleled level of professionalism and expertise to our agent and agency manager development efforts.

What sets Equis apart is their deep understanding of the insurance industry. Their team brings real-world experience to every engagement and consistently excels in coaching, human resources, and financial development. Early in our partnership, they took the time to truly understand our unique business model, immerse themselves in our culture, and learn our internal language—an investment that continues to pay dividends.

One of the most impactful outcomes of our collaboration has been the transformation of our approach to agency manager promotions.

Thanks to Equis, we no longer promote blindly into leadership roles. Their guidance and training programs have resulted in significantly more successful agency managers, better prepared to lead and grow.

Importantly, we don't view Equis as just a vendor; they are truly part of the KFB family. Their involvement has grown far beyond agency manager training to include staff development, leadership programs, emerging leader initiatives, and executive coaching. They have become an essential partner in our organizational growth, and we rely on their insight regularly.

I can't speak highly enough about the value Equis brings to the table. They are trusted, professional, collaborative, and fully aligned with our goals.

I look forward to continuing our partnership for many years to come.



Kentucky Farm Bureau Mutual Insurance Company
Christy Curry, Education Services Manager, Leadership Training
June 13, 2025