

brought to you by:



IA-MBA

BIG **i**<sup>®</sup>

INDEPENDENT INSURANCE AGENTS & BROKERS OF  
SOUTH CAROLINA

# ***A mini-MBA created for the leaders of independent agencies.***

## **What is the IA-MBA?**

The IA-MBA is an education & networking program built for the current & future leaders of independent agencies to learn the skills needed to enhance your agency's profitability & success.

## **How does it work?**

A hybrid of self-paced learning with expert-led facilitated live sessions to both learn and implement these practices within your agency immediately.



## **Gain New Knowledge**

The tools & knowledge to become a master of people management & agency finances.



## **Grow Your Network**

Gain an incredible network of connections to agency leaders across the country.



## **Access Expert Coaching**

Have bi-weekly live conversations & coaching with the experts of our industry.

TO REGISTER & LEARN MORE VISIT:

**GoalMakers.com/iiabsc**

HAVE QUESTIONS? EMAIL US AT:

**Team@GoalMakers.com**

# What is the IA-MBA?

## A Cohort-Based Business Program Created for Independent Agency Leaders

Based on a streamlined MBA curriculum, with relevant & actionable knowledge every leaders in an independent agency needs. In just 10-weeks you will learn how to build organizational alignment, empower your team to serve your clients better, and the financial fundamentals to build a more profitable agency.

WEEK 1 & 2



Vision, Goals, & Planning Process

WEEK 3 & 4



Coaching Teams & Serving Customers

WEEK 5 & 6



Empowering People & Systems of Management

WEEK 7 & 8



Demystify the Finances: A 2-Part Case Study

WEEK 9 & 10



Apply the Finances: Grow the Bottom Line

## Live Expert Facilitation & Coaching

Every two weeks you will learn from, discuss, and gain new insights from conversations with industry experts Carey Wallace & Jason Sabo. This helps you to implement and refine your experience throughout the program.



## Network & Learn From Your Peers

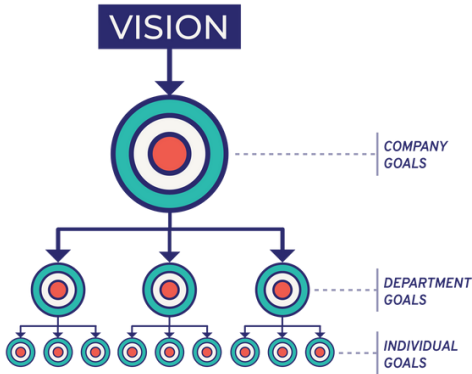
The IA-MBA recruits leaders in the independent insurance world from across the country. This is an opportunity to gain the knowledge and network with fellow leaders during the program and join the IA-MBA's growing alumni community.

## Gain the IA-MBA Certificate

By the end of this course you will have the skills, knowledge, and resources you need to be more successful so let the world know it! Upon completion of this program you will receive the IA-MBA certificate for LinkedIn & professional credentials.



# Curriculum



## Set Goals All the Time

**Craft a vision, your long-term goal 3-5 years from now and the North Star for your entire team. Learn what makes a 'good goal' and create agency-wide, department-level, & individual goals that align with your vision.**

## Focus on the Process, Not a Plan

**Get a baseline of your company's current status by collecting valuable information from the entire agency team. Adopt an agile planning process to adapt in today's ever-changing conditions.**



## Coach the Right People

**Clearly define positions and create position descriptions for ourselves and key roles within your organization. Identify the right natural abilities and determine if your people are in the best place for success.**

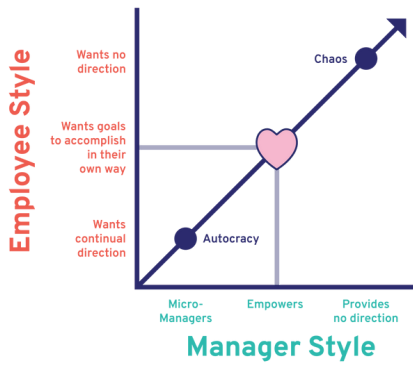


## Serve the Right Customer

**Identify your right customers, then determine how you find more of them. Build a sales process, streamline your operations processes, and foster a culture & strategies necessary to serve the right customer.**



# Curriculum



## Empower Your Entire Team

Learn how managers empower their team members by establishing clear goals and allowing people to achieve those goals in their own way. Implement our empowerment system of “wide boulevards, high curbs” as your management style.

## Do the Right Things Right

Use six simple tools to measure and manage your company’s performance. Build your own System of Managing, provide clarity and purpose, steering team members to accomplish their individual and the agencies goals.



Year One	Year Two	Year Three
<b>Activities</b> Buy Stuff Plant 1 <sup>st</sup> Crop	<b>Activities</b> Buy More Stuff Plant 2 <sup>nd</sup> and 3 <sup>rd</sup> Crops Harvest 1 <sup>st</sup> Crop Sell Most of 1 <sup>st</sup> Crop	<b>Activities</b> Buy More Stuff Plant 4 <sup>th</sup> and 5 <sup>th</sup> Crops Harvest 2 <sup>nd</sup> and 3 <sup>rd</sup> Crops Sell Most of 2 <sup>nd</sup> and 3 <sup>rd</sup> Crops Sell Rest of 1 <sup>st</sup> Crop
<b>Revenues</b> \$0	<b>Revenues</b> \$10,000	<b>Revenues</b> \$22,000
<b>Expenses</b> Tractor \$25,000 Fertilizer \$1,500 Seed \$800 Other tools \$2,000	<b>Expenses</b> Tractor Tools \$5,500 Fertilizer \$3,000 Seed \$1,600 Other tools 4,000	<b>Expenses</b> Tractor Tools \$2,500 Fertilizer \$3,000 Seed \$1,600 Other tools 3,000
<b>Cash left over or (owed)</b> (\$29,300)	<b>Cash left over or (owed)</b> (\$4,100)	<b>Cash left over or (owed)</b> \$11,900

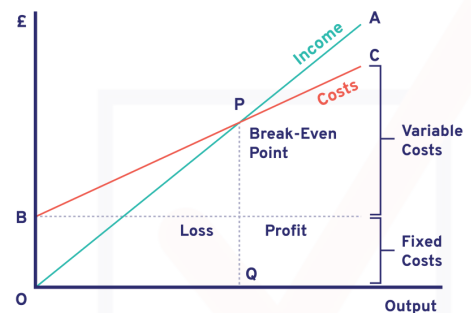
## Demystifying the Financials

Understand how to read and use your agency's financial documents through our case study agency to provide real-world context. Learn the how you can use the financial data to map (and improve) the future of your agency.



## Applying the Financials

Focus on elements that grow (or shrink) the bottom line, starting by understanding the benchmarks within our industry and calculating how you can set realistic goals that you and everyone in the agency can contribute to to improve your EBITDA.



# Expert-Led Group Facilitations

Learn from the experts & community during bi-weekly live collaborative learning & implementation sessions.



## Program Kick-Off & Onboarding

Meet the cohort of your peers in the program! Then discuss how to use the GoalMakers platform and provide an overview of the curriculum and key dates.



## Vision, Goals, & Planning Process

Establish your personal goals to work toward and create action steps to achieve them. Then discuss market changes with the cohort and how we can create strategy adjustments to adapt to these external forces.



## The Right Team & Right Customers

Does everyone understand their role, are they in the right role, and how do you hire the talent you need to grow? Once you have the right team, determine how you can best define and serve the **right** customer.



## An Empowered System of Management

A great manager empowers their team to achieve their goals without micro-management or being hands-off, we will discuss both the empowerment style and proper systems to be a master manager.



## Demystifying the Financials

Financial understanding breeds accountability, we will discuss the key financial documents you must understand as you grow in your career.



## Applying the Financials + Graduation

How do you apply these financial lessons in your day-to-day? We close with guidance on how to continue your growth beyond this program.

# Join the leaders in our industry today & transform your agency with the IA-MBA!



**Chase Keller**  
President



"Two Words: Do It! The program offers a time-efficient streamlined format & relevant real-world content. Take this opportunity to position your agency for success."



**Michelle O'Connor**  
Owner



"I would definitely recommend this program. It gives you an in-depth look at your own agency and it's done in a step-by-step manner."



**Landon Bentham**  
Director of Sales & Marketing



"It was transformational!

One benefits are that you move through the program with a cohort of people, who are in similar situations you are."



**Don Stroud**  
President



"Anyone in the independent insurance world could readily gain knowledge & skillsets from this program that would be helpful in the growth of their career."

The IA-MBA is brought to you by:



INDEPENDENT INSURANCE AGENTS & BROKERS OF  
SOUTH CAROLINA

To learn more and register with special member pricing click or scan:

[www.goalmakers.com/iiabsc](http://www.goalmakers.com/iiabsc)



STILL HAVE QUESTIONS?

GoalMakers team will be happy to chat, just email them at:

[Team@GoalMakers.com](mailto:Team@GoalMakers.com)