

# THE IA-MBA

Brought to you by

**BIG i**<sup>®</sup>

INDEPENDENT INSURANCE AGENTS & BROKERS OF  
**SOUTH CAROLINA**

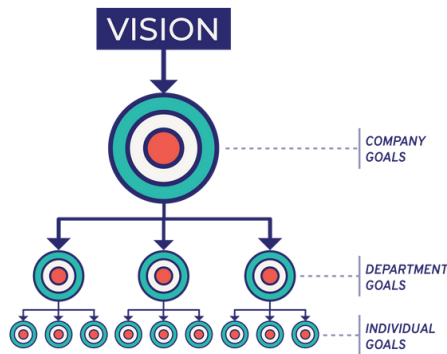


**Empower yourself and team with the  
business knowledge, skills, & resources  
to grow an even more successful agency.**

To learn more & register yourself or teams visit:  
[www.goalmakers.com/iiabsc](http://www.goalmakers.com/iiabsc)



# CURRICULUM OVERVIEW

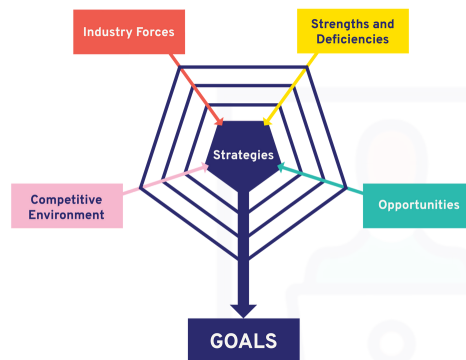


## Set Goals All the Time

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

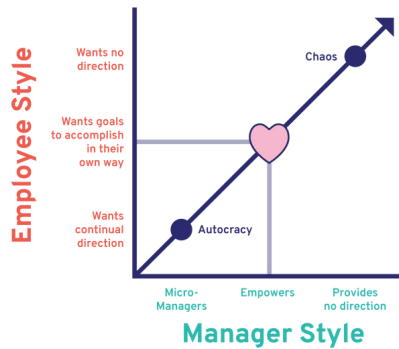
Clearly define positions and create position descriptions for ourselves and key roles within your organization. Identify the right natural abilities and determine if your people are in the best place for success.

## 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 OVERVIEW



## 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>Revenues</b> \$0  <b>Expenses</b> Tractor                 \$25,000 Fertilizer                 \$1,500 Seed                         \$800 Other tools                 \$2,000  <b>Cash left over or (owed)</b> (\$29,300)	<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>Revenues</b> \$10,000  <b>Expenses</b> Tractor Tools                 \$5,500 Fertilizer                         \$3,000 Seed                                 \$1,600 Other tools                         4,000  <b>Cash left over or (owed)</b> (\$4,100)	<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> \$22,000  <b>Expenses</b> Tractor Tools                 \$2,500 Fertilizer                         \$3,000 Seed                                 \$1,600 Other tools                         3,000  <b>Cash left over or (owed)</b> \$11,900

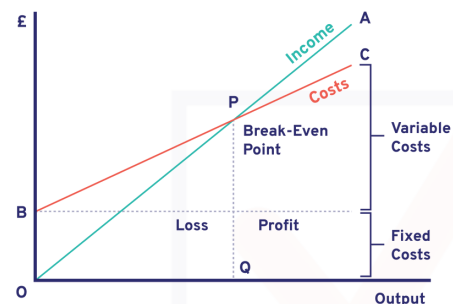
## Demystifying the Financials

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.



# FACILITATION OVERVIEW

The IA MBA is a 10-week facilitated learning experience featuring bi-weekly collaborative learning & expert led group discussions.



## 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.