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Seely & Durland, Inc.

Transition to Growth



# Goals for Transition

- Create a Customer Relations Team
- Best Practices Agency within 3 yrs
- Become Serious Competition for
  - Direct Writers
  - Internet Based Insurers
- Concentrate on Clients, not Customers

“Price is only a factor in the absence of value”

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# Definition of a Client

- Lets you handle entire account
- Your Best Referral Source
- Trusts your advice
- Price is not the #1 Priority
- With you for the long haul
- A True Relationship

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# SDI Current Process

- Organic Growth is Reactive
- Cross Selling has Improved but far from our potential
- ALL Processing handled by CSA and Assistant
- Life sales in their infancy
- Primary CL sales person is owner

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# New SDI Strategy

- Create a true sales culture in all departments
- Provide a mechanism that SUBSTANTIALLY rewards Growth
- No One will be paid less than in 2006
- Provide attainable goals with Tiered Bonus opportunities
  - Policy Count
  - Policies Per Client
  - Writing more than one policy initially
- Hire another Commercial Lines Producer



# Client Relations Professional

- Job Responsibilities
  - ALL transactions that involve client contact except claims
  - Contact existing clients for cross sell
  - Handle all new business
  - Create Marketing Plans & Follow Up
  - Attend Networking Events
  - Nurture Relationships with Referral Sources
  - Respond to Questionnaires
  - Key Client Visits
  - Backup for Processor
  - Backup for Claims

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(example)

Current Salary	\$35,670
2006 Commission	\$ 619
2006 Cross Sell	\$ 1,935
2006 FS	\$ 0
2006 Overall	\$38,224



# Client Relations Professional Incentive Assumptions

- 35% Commissions on ALL new business
  - i.e. 2006 NB Revenues = \$22,988
  - 35% = \$8,046
- \$500 Bonus for increasing overall client count by 35
  - As of 12/31/06 = 525
  - Reach 560 to receive bonus
- An additional \$500 for each 35 customer increment over 525
  - Reach 595 to receive additional \$500
  - Reach 630 to receive another \$500
- Receive \$250 for each .01 increase on Average # of Policies per Customers
  - Current value = 1.79
  - Move that to 1.80 and receive \$250
  - Move to 1.81 and receive another \$250



# Client Relations Professional 2007 Goal

	2006 What If Scenario	2007 Goal
Flat Salary	\$30,000	\$30,000
New Business	\$22,988	\$47,775
New Commission (35%)	\$ 8,046	\$16,721
Policy Count Bonus	\$ 0	\$ 1,000
Policy Per Customer Bonus	\$ 0	\$ 500
Total Compensation	\$38,046	\$48,221