

## Course Outline

How to Accelerate Growth of your Brokerage	Content
<p>A workshop specifically designed for owners, managers and leaders of insurance brokerages.</p> <p>Managing any business is challenging, but when you have clients to satisfy, staff to manage, compliance processes to follow and budgets to meet, it can be difficult to plan the strategic growth of your firm.</p> <p>You must think of your business in terms of 'carefully balancing three functions':</p> <ol style="list-style-type: none"> <li>1. Sales &amp; Marketing - finding clients &amp; selling to them</li> <li>2. Operations - delivering your service/product to your clients</li> <li>3. Financial Management - keeping finances in order</li> </ol> <p>Business leaders must recognise that these three functions need always to be in balance and moving smoothly together. If one function becomes out of balance, there could be problems!</p>	<ul style="list-style-type: none"> <li>• Where are you now? How good is your business?</li> <li>• What is your potential to grow?</li> <li>• Developing the 'Grand Plan' - how your business will get to where you want it to be</li> <li>• How to develop a business plan that helps you make profit</li> <li>• What do highly successful brokers focus on?</li> <li>• Profitability tactics... how to maximise profit</li> <li>• Managing your time</li> <li>• Planning your sales &amp; marketing activity</li> <li>• How to maximise your sales conversion rate</li> <li>• How to stay on track</li> </ul>