



Blueprint Consulting Group
MAXIMIZING SHAREHOLDER VALUE

The Breakthrough

A Two Day Training and Development Workshop
For Benefits Advisors

Essential Elements of Execution (E3)

Blueprint Consulting Group supports exclusively insurance agents and brokers. We are an “execution” company. We have created a unique method to help agencies grow that goes beyond training to impact an individual or organization’s results.

The Essential Elements of Execution (E3) work together to create sustainable growth. When your agency is weak in one, your performance in the others is diminished and achieving sustainable growth becomes increasingly difficult and uncertain.

When all elements converge, sustainable growth is inevitable.

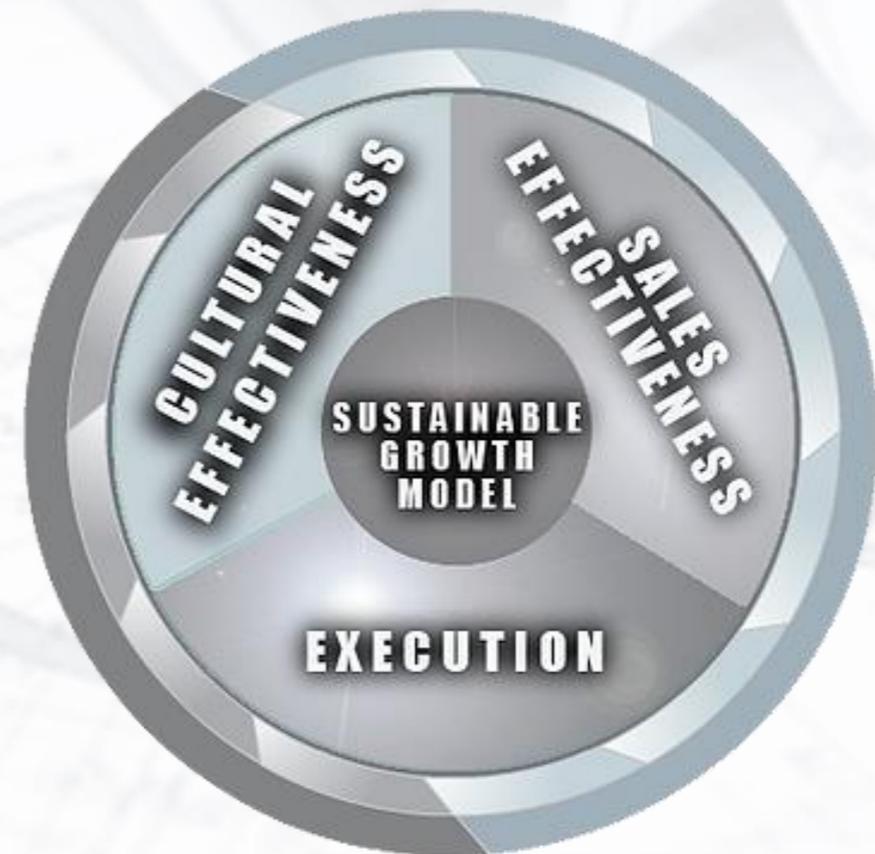


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The Five Producer Bottlenecks

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Producer-Centric

Blueprint leverages a producer-centric sales leadership philosophy and producer development model. It is highly structured and centers around coaching. This model is designed to remove the frustration and ineffectiveness of *accountability-centric* (stick) models.

We believe there are 5 Bottlenecks to producer book growth:

1. Expectations
2. Time
3. Who do I call
4. What do I say to get them to see me
5. What needs to happen for them to hire me

As a member of our program you have access to a complete set of tools and capabilities to help every individual or group become highly effective at each of these areas that prohibit sustainable growth.

The ***Breakthrough*** for each Bottleneck

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Expectations

- We believe at some point most producers surpass the expectations they set for themselves or that someone else set for them.
- For **individual producers**, we work to help re-cast a vision for their future and get them excited about growing again. Often times, helping them understand what lead indicators they can focus on to efficiently grow revenue may be all it takes.
- For **agency leadership**, we have developed a unique set of tools to help set and give feedback on expectations. This is crucial for new and/or un-validated producers to help them understand what is necessary to grow at high levels and garner a greater Return on Investment for agency shareholders.

Blueprint Producer Guide™

The producer guide is built for...
 This is a tool to engage producers...
 2. As a producer recruiting tool...

Our Ideal Customer:
 95% of our revenues come from our ideal customer.
 The single client makes up more than 25% of our revenues.
 We retain 95% or more of our ideal customers each year.

Staying inside the 3 circles keeps you "on track" and earning the highest level of compensation.

100% of you has been achieved for the last 90 days.
 4. Quarterly report completion

You Work for Me
 100% of reports must be completed quarterly to remain "on track"

You Work for You
 100% of follow-up goals must be completed quarterly to remain "on track"

You Work for Me
 100% of reports must be entered in an CRM and not out of the office to remain "on track"

Off Track
 Probationary

Once outside of the 3 circles, you are deemed "off track."

Robust Pipeline™

Producer Profile Information						
Producer Name	Jim Smith					
Annual Revenue Target	\$100,000					
Sales Cycle (Months)	3					
Close Ratio	33%					
RP Watermark	\$75,758					
Robust Pipeline Report						
Company Name	X Date	First Appointment Date	Proposal Date	Revenue Projected	Last Exchange	
Sample Company 1	6/5/2011	4/22/2011	5/20/2011	\$5,000	5/17/2011	
Sample Company 2				\$6,000		
Sample Company 3				\$7,000		
Sample Company 4				\$25,000		
Sample Company 5				\$42,000		
Sample Company 6				\$18,000		
			RP Actual	\$103,000		
			RP Plus/Minus	\$27,242		

Time

- One of the most common bottlenecks we encounter in coaching is the reality (and perception) that as a producer, “I don’t have time to go after new business”.
- It is a real concern that has forced us to become innovative about how we approach the “time” bottleneck.
- The Blueprint “Quarterly Sprint” and “Ideal Client Profile” coaching sessions are commonly requested to help solve this problem.

“My life, and my book size are a reflection of my habits”.

5 Million Dollar Producer

The Quarterly Sprint™

The Quarterly Sprint

New Business

Strategic Accounts	Intro Sources to Leverage
30 Prospects in 90 days. Develop a strategy to reach one new client every 3 days.	Of the individuals with whom you have already developed trust, who can they intro?
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
Relationships to Develop	
What Elephants Should You Be Husting?	
16	
17	
18	
19	
20	
21	
22	
23	
24	
25	
26	
27	
28	
29	
30	

Strategic Planning

In the coming 90 days, what can you do to open doors opportunities? What pockets of business can you pen Associations, Networks and Seminars etc. ?

1	
2	
3	
4	
5	
6	
7	

Delegation

Your primary task is to “produce”! What are you doing during any given day that is standing in your way? Who can do these tasks instead of you? When can the work be transferred?

TASK	PERSON	DATE
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

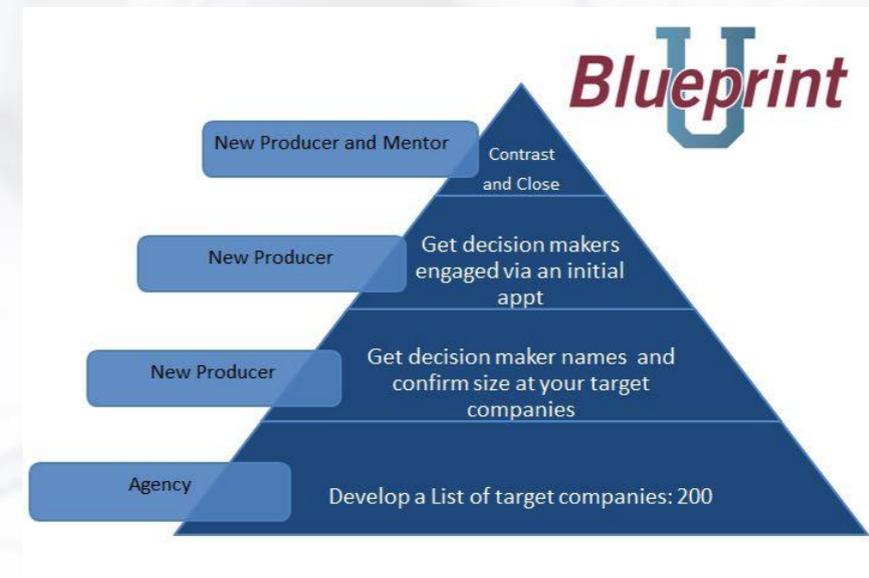
Ongoing Personal Development

What areas of knowledge are you working on expanding? What relationships do you want to develop? What new project can you pursue that could lead to new sales? Have you read a book lately?

Undertaking	Who	Why	Planned Result
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Who do I call?

- Identifying the right companies to target, and the appropriate decision maker(s) within them, can be a real challenge. Done properly, it requires more than a database of lists.
- Most producers have little confidence in this discipline and it has cost agency shareholders untold amounts of money.
- A seasoned producer's time and energy can be much better leveraged by having access to business intelligence that allows them to open and close new business more efficiently and effectively.



miSearch miDashboards logged in. miAccount Logout

Search Clear Search Advanced Search

Company: Company State: [All] Business Category: [All]
 Agent Name: Agent State: Texas Sub-Category: [All]
 Accounting Firm: Revenue: Any Employees: Any

Show 50 entries This was an Advanced Search Request

Company	EE's	Company State	Renewal	Agent-1	Agent-1 State	Agent-2	Agent-2 State	Revenue	Commission	Fees	Premium
BOOTS AND COOTS, LLC	421	TX	1/1/2011	USI INSURANCE SERVICE!	TX			\$371,473	\$323,736	\$47,737	\$5,277.1
TRUSTEES OF ACEC LIFE+P	17,261	TX	1/1/2010	USI SOUTHWEST INSURAN	TX			\$339,134	\$339,134	\$0	\$130,391.1
GEOKINETICS SERVICES C	963	TX	5/1/2011	USI INSURANCE SERVICE!	TX			\$263,792	\$246,637	\$15,155	\$1,132.1
CYBERONICS, INC.	396	TX	7/1/2011	USI INSURANCE SERVICE!	TX	USI INSURANCE SERVICE!	TX	\$240,491	\$213,996	\$26,495	\$4,883.1
FULTON COUNTY MEDICAL	254	PA	1/1/2010	USI INSURANCE SERVICE!	TX			\$229,684	\$86,268	\$143,416	\$451.1
SAA MOTOR FREIGHT LINE	9,484	LA	4/1/2010	USI INS SERVICES LLC	TX			\$209,400	\$174,500	\$34,900	\$2,089.1
TRUSTEES OF ACEC LIFE+P	21,755	TX	1/1/2009	USI SOUTHWEST INSURAN	TX			\$200,751	\$200,751	\$0	\$142,940.1
YOUTH AND FAMILY CENTE	1,420	TX	1/1/2011	USI INSURANCE SERVICE!	TX			\$199,919	\$192,919	\$7,000	\$9,939.1
YOUTH AND FAMILY CENTE	1,862	TX	1/1/2010	USI SOUTHWEST INSURAN	TX			\$187,816	\$180,816	\$7,000	\$9,110.1
FAST GROUP HOUSTON, INC	274	TX	10/1/2009	USI INSURANCE SERVICE!	TX	USI INSURANCE SERVICE!	TX	\$187,132	\$175,907	\$11,225	\$783.1
CHR SERVICES	350	TX	1/1/2011	USI INSURANCE SERVICE!	TX			\$183,394	\$171,572	\$11,822	\$3,509.1
CAL DIVE INTERNATIONAL											

Showing 1 to 50 of 123 entries

Export Contact Data CSV

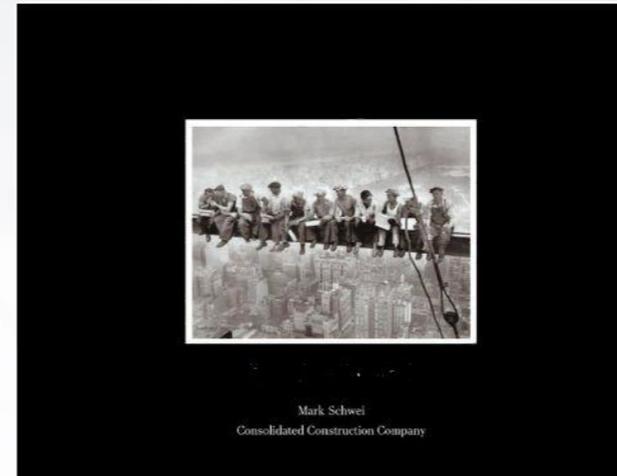
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What do I say to get in front of them?

- Since we began recruiting and developing new producers for our clients, our focus on innovative methods to help producers open new opportunities has become one of our highest priorities.
- As we became better students of prospecting methods, we became better prospectors ourselves. This insight has been invaluable to be effective coaches and help our clients achieve sustainable growth.
- We have developed several Key Performance Indicators (KPI's) for effective prospecting that allow us to train, coach and measure prospecting effectiveness.

"I have been a professional sales person for nearly 15 years and I was surprised that someone could provide me tools that would get me TWICE the results, per attempt than what I have done previously...thank you Rubiks' Cube"

Dwayne R.
TX



Concentric Circles of Prospecting™



Unique Language
(don't show up as a commodity)

In 1980 Ideal toys started selling a puzzle created by Hungarian sculptor and professor of architecture, Erno Rubik. It was originally called the "Magic Cube", but you may know it as the Rubik's Cube. There have been over 350 million Rubik's Cubes sold and it is widely considered the world's best-selling toy.

In 1980 it took the world by storm and became an obsession to both child and adult alike. In fact, when someone solved the puzzle (and they could prove that the stickers weren't removed and then replaced back in their proper location) the story would be considered news worthy by many local and national news outlets.

In 1981, David Singmaster, a Rubik's Cube enthusiast published a series of steps that would always solve the puzzle in less than one hundred steps and forever remove the mystery of the "Magic Cube".

Unlike the Rubik's Cube, health insurance costs for employers is no game, but the mystery of how to solve this very expensive puzzle has created a similar obsession with business owners and the financial stewards of a company's bottom line.



Long gone are the days of simply trying to manage an expense to capture all the value for the dollars that are being spent.

Much like Singmaster's algorithm to solve Rubik's Cube, however, we at ABC Insurance believe we have similar series of steps to remove the mystery of how to begin realizing a valuable return for the money an employer is spending.

If you are scratching your head on how to feel the value of such a large item on your P&L then we invite you to take a look and see if it will do for you what it has done for others - Remove the frustration and mystery around your insurance expense and workforce initiatives.

I will call you in the near future to see if you are open to setting up a time for us to talk. I have also attached my business card in the event you have a pressing need.

Sincerely,

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What needs to happen for them to hire me?

- We understand there is a formula for change to occur and that includes a potential buyer's willingness to change brokers.
- We take the guess work out of why someone will change brokers so our clients can grow as efficiently and effectively as possible.
- Understanding and implementing the "Change Formula" within the selling dynamic has proven to help increase effectiveness and decrease the amount of time a new producer takes to learn to write business.

$$D \times V \times F > R$$

D = Dissatisfaction

V = Vision for the future

F = First Concrete steps

R = Resistance to change

"I began using the Blueprint Selling approach 5 years ago and it has more than tripled my income and has created deep client loyalty. Time and time again I hear, "We've never thought of it that way before.

80% closing ratio from proposal to BOR and 28 BOR's using the process.

It's the differentiator."

D. Bell
Dallas, TX.

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What needs to happen for them to hire me? Continued...

- **Learn how top Benefits Advisors leverage the full breadth the market's tools and capabilities**
- We have developed a proprietary set of tools that help a producer avoid being sucked into a bidding war.
- We can avoid time wasters that never intend on hiring us but are simply trying to “keep their broker honest”.
- By interrupting the traditional insurance buying process, our closing ratios go up and growth is more predictable and profitable.

“The Pricing Formula conversation has gotten me excited about the business again. I was so sick of the renewal stampede I had stopped trying to get in front of prospects. I just brought in a 75K revenue account and my client said I was the only broker who had this type of discussion with him.”

*J Howse
Houston, TX*

Tools for Brokers:

The Pricing Formula™

The Key Performance Indicators (KPI's)

The Health Trend Bender™

The Annual Train Wreck™

The Money Zone™

What needs to happen for them to hire me? Continued...

We believe...

- True “advisors” follow an advisory process
- Clearly defined steps that focus on better outcomes for clients
- Diagnostic tools are necessary to efficiently understand a client’s needs



	1	2	3	4	5	6	7	8	9	10	
Our benefit programs are fragmented, cumbersome and without focus.											Our benefit programs are integrated, streamlined and focused.
Circumstances beyond our control are forcing us to shift a growing amount of benefit program costs to employees.											We are in control of benefit program costs and maintain an equitable financing arrangement with our employees.
Our annual renewal process is reactive and causes anxiety.											Our annual renewal process is proactive, orderly, simple and satisfying.
Our employees do not understand and fully appreciate the value of the benefits we provide.											Our employees understand and fully appreciate the value of the benefits we provide.
The presentation, communication and education around our benefits does not motivate and engage our employees.											The presentation, communication and education around our benefits motivates and engages our employees.
Our systems, processes and technology are not integrated, automated or scalable.											Our systems, processes and technology are integrated, automated and scalable.
We do not have clear metrics for measuring performance, progress and return on investment.											We have clear metrics for measuring performance, progress and return on investment.
Providing benefits has become increasingly complicated and unmanageable.											Providing benefits has become increasingly simplified and manageable.
Employees take little responsibility for their actions and decisions that impact benefit costs.											Employees take responsibility for their habits and decisions that impact benefit costs.
Providing benefits is a growing liability we wish would just go away.											Providing benefits makes a substantial contribution to our long-term success.

What needs to happen for them to hire me? Continued...

- Many agents and brokers aren't getting near the credit for the value they create for their clients. It's even more difficult with prospects.
- Blueprint leverages innovative packaging techniques to help showcase your value.
- We believe it's about getting your clients and prospects better outcomes instead of it being about all your agency's "stuff".
- "Value Creation" is about your value being relevant.
- The Blueprint Proposal is not only designed to help you "win the deal" but to help producers be confident in a fully transparent or fee based arrangement.

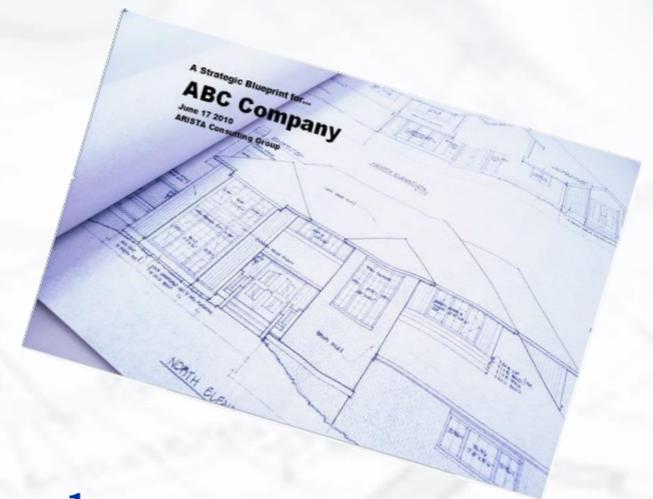
"I have invested heavily in different types of sales training, agency tools and resources so I can be competitive. The value creation techniques my team learned through Blueprint have allowed us to finally be able to tell our story and present our strategies and tools in a way that is spot on to client needs. My account managers now know what our sales people are promising too"

C. Fisher
Kalamazoo, MI

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"Value Creation" Tools

The Benefits Blueprint



Red Flags Method

