



**Independent
Insurance**
Agents of Texas

MEMBERSHIP MAKES YOU STRONGER

IIAT Agency Consulting **MAXIMIZE** **YOUR AGENCY**

We know the challenges you're facing.
Let us help you solve them.



How it Works

IAT's consulting is not a one-size-fits-all service. We'll work with you to review your agency's needs, recommend services, and design a monthly consulting package exclusive to your agency.

**Monthly Packages are executed on 6-month contract.*



Starter Package

2 hours \$300 (monthly)



Executive Package

10 hours \$1,350 (monthly)



Performance Package

6 hours \$855 (monthly)

[Learn more at iat.org/Consulting](https://iat.org/Consulting)



Running an independent insurance agency is difficult work.

It's easy to feel overloaded when the job requires you to work in many different lanes – management, HR, accounting, sales and strategic planning. Not to mention, you must perform the day-to-day duties of running a business while also planning to achieve your strategic goals.

IIAT's Consultants Can Help

IIAT Consultants can help you with many different aspects of your business. Common objectives include developing a more focused strategy for increased sales and profits, improving business operations and efficiency, and implementing a clearly defined management strategy. Here's some of the services we can perform:

- Analyze team strengths – put the right people in the right seats
- Assess employee engagement and company culture
- Review agency metrics
- Develop a strategic leadership blueprint
- Evaluate your book of business for opportunities and profitability
- Optimize carrier relationships and contract management
- Improve operational efficiency
- Review benefits and compensation philosophy
- Set clear staff performance expectations
- Boost agency profitability
- Develop vision and mission statements
- Evaluate processes and workflows
- Create a hiring and onboarding strategy
- Assess Agency Management System integration
- Conduct a technology review

Meet the IIAT Consulting Team



Kim Hutson, Marit Peters, Angela Ford, Carey Wallace, Jennifer Bejarano, Carie Ann Roach

Learn more about the team at iiat.org/Consulting



Let Us Be Your Strategic Business Partner

IIAT's team of experienced agency consultants can work with you to identify business gaps, overcome pain points, and implement proven strategies to achieve your goals.

GET IN TOUCH..



Go to iiat.org/Consulting



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