

Think about your company.
Is the road ahead clear?



Remove the distractions that
have your team deadlocked.
Clear away the haze that has
your business stuck. What's left
is an open road leading in the
right direction.



InStrategy helps rethink and refocus

Leadership

InStrategy Group works with CEOs, Boards of Directors and executive management teams to fine tune companies. Even good businesses can lose focus, become mired in the day-to-day, and just stop listening and looking ahead. While others can tell you what's wrong, InStrategy shows you how to fix it – and the answers can usually be found within your organization.

To get to the answers that seem just out of reach, we fully immerse ourselves in your world. It's a personal process, not a clinical one. We listen and learn about your people, products, customers, technologies and processes. We define your internal pain and your external challenges. And together we map out the course for evaluating, analyzing and potentially changing the path you take.

Our Leadership services include:

- Strategy development
- Leadership coaching
- Corporate culture revitalization
- Business planning
- Growth & acquisition consulting

How We Work

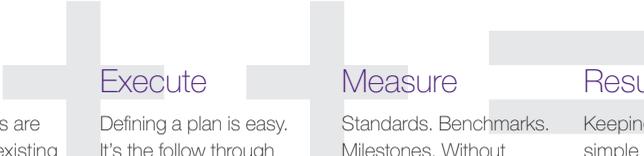
We fight from the battlefield – not the war room. Our experience enables us to get in the trenches with you to assess, formulate and execute innovative strategies that fuel change.

The Clear Difference

The size and scale of InStrategy Group is perfect for building trust and mutual respect with our clients. Functioning as active members of your team, we put some skin in the game – sharing the risks and rewards. We work hard to leave your company in a better position than before, and if you're not satisfied we will do whatever it takes to make it right.

InStrategy Group is a consulting firm serving the insurance industry. We are a team of seasoned executives, front-line leaders and creative entrepreneurs. Strategists who help guide organizations through the challenges that impact performance – and see the path of opportunity.

Simply put, InStrategy Group refocuses companies on achieving great results. We help identify what works, fix what's wrong and measure what really matters. In the end, our team clears the way for your business to go and grow.



Focus

Often businesses are so immersed in existing ways of working that change is hard to achieve. InStrategy Group helps you focus on a new direction. Based on your objectives, we help you clarify challenges, develop strategies and prioritize processes that are clear and simple to follow.

Execute

Defining a plan is easy. It's the follow through that's tough. With InStrategy Group, you'll stay the course. Whether your focus is sales, service, distribution or marketing, we roll up our sleeves to help you structure the plan and get down to business.

Measure

Standards. Benchmarks. Milestones. Without measurement, how do you know when desired results are achieved? InStrategy Group helps you establish metrics for tracking what worked, what didn't work – and the relevant reasons why.

Results

Keeping the solution simple and focused on people, process and profit, InStrategy Group helps get your business from "here" to "there". Our goal is to help you improve performance, achieve competitive advantage and sustain profitability – **and we leave as a result.**



InStrategy helps restore and refocus

Operations

Regardless of size or complexity, companies that increase operational efficiency reduce costs, increase customer satisfaction and improve their bottom lines. And greater efficiency drives competitive advantage – especially as top line growth is slowing, and sales and marketing costs are on the rise.

InStrategy Group helps organizations assess the efficiency of their operations. We examine “how things work”. Evaluating your people, processes and performance, our goal is to realign departmental strategies with your company’s overall business plan. The focus: simplifying and streamlining operations. We establish best practices for improvement, identify emerging technologies to optimize output and coach key stakeholders on their responsibilities. We remove the obstacles so you can chart a competitive course in an increasingly competitive world.

Our Operations services include:

- Operations and process evaluation
- Measurement analysis
- Human resource imperatives
- Service standards
- Talent assessment
- Underwriting and control audits

Who We Work With

- Independent Insurance Agencies
- Insurance Companies
- Brokerage Firms
- Wholesalers
- Managing General Agencies
- Captives
- Third-Party Service Providers
- Underwriting & Control Audits

Our Approach

Achieving operational efficiency isn't complicated. It's about getting “back-to-basics”. Taking one step at a time, InStrategy Group addresses your people, processes and performance to define and implement strategies that boost efficiency.

The goal: sustainable improvement over time.



InStrategy helps regroup and refocus

Sales

How can I grow my business regardless of market cycle or changes in the economy? The need for a predictable and sustainable revenue stream is a challenge many organizations face. InStrategy Group can relate because we've been in the trenches with companies throughout the insurance industry for over thirty years.

So we approach the sales side of your business just as we would your leadership and operations – but with a keen understanding that sales is what brings in the money. We get to the source of your pain by defining your past and present challenges, and establishing your future business goals. And where others see unanswerable questions, InStrategy Group finds the solutions that make your business more predictable, more manageable and more profitable.

Our Sales services include:

- Sales modeling
- Pipeline management
- Distribution management
- Growth consulting
- Consultative sales training



We Focus on:

Business Sustainability

- Like the rings of a tree, strength and growth comes from the inside out
- Innovative thought leadership and effective management form the core
- Energizing people, optimizing processes and operations enhances performance
- Sales best-practice strategies fuel growth
- Each ring builds upon each other for true sustainability

Why InStrategy Group?

With over thirty years experience in the insurance industry, InStrategy Group has seen what works and knows what doesn't. Our clients benefit from this front-line experience. Applying practical knowledge and objective insight we steer companies out of the "trial-and-error" phase – into the next level of performance, growth and profit.



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