



- > alignment
- > innovation
- > differentiation
  - > strategy
  - > results
- > human capital
  - > leadership
- > productivity
- > brand

# GET THE EDGE

InCite Performance Group Members:

Welcome to Ignite Tampa!

We believe this event will be a true game-changing event for many of our agency partners.

Our annual event (that used to be semi-annual), has evolved and I want to point out some items that will help your overall experience.

1. Networking – This event used to be 75% networking and 25% new ideas. Ignite has flipped that objective. We believe agencies have great ideas but lack the ability to implement. Ignite is designed as a training event to educate and inspire toward getting results. However, make sure you are networking where it brings value to you.
2. InCite Team – I hope you will spend time getting to know our InCite Team Members. We are all very busy at Ignite, but never too busy to spend time getting to know you better. Grab us and let's talk.
3. Execution – We are going to be discussing execution extensively at this event. Make sure you have a plan to execute what you learn. Get with your Advisor on your next call and make sure we know what you are working on. We will help!

It is an honor to be the Advisors to incredible firms in North America. We look forward to seeing how you will be “getting the EDGE” in your market in 2019.

Sincerely,



Larry G. Linne  
CEO – InCite Performance Group

**InCite Performance Group** has the most diverse and experienced team of Advisors in the insurance industry. Our expertise expands across all areas of the agency. We have expertise in:



**Quantify and Measure RESULTS**

# Advisors



Larry Linne



Brandon White



Bonita Argent



Gregg Goodmanson



Drew Yancey



Maura Derstein



Mark Lacher



Chad Lacher



Mike Natalizio

# Larry Linne

Partner/CEO/President



## 19 Years in Industry & 14 Years at InCite

### Experience

- CEO at InCite Performance Group since 2009. Joined the company in 2005 and purchased with Partners in 2014
- VP Sales and Consulting at Manuel Lujan Insurance Agency in Albuquerque NM
- Partner at Bushido and Ambassador Captive
- Partner at Performance Captive LLC – a captive insurance facility in the Cayman Islands

### What do you do to give you the EDGE in your career?

“I keep the discipline of reading vs wasting time on things that don't make me better. I also evaluate relationships and activities monthly to determine which are bringing mutual benefit. I eliminate and/or move away from relationships that do not bring results.”

### Industry Value Experience

- Involved in dozens of successful captive insurance sales
- Is actively involved in millions of dollars of insurance sales every year
- Written two books on leadership and personal branding
  - Brand Aid
  - Make the Noise Go Away

### Passion

- Helping insurance agency businesses accomplish what they don't know is possible
- Extreme health and fitness
- Individual personal growth and discipline
- Innovation
- Persuading the world to be better at all things

### Unique Skills

- Development of intellectual capital that can be used for personal and corporate growth
- Public speaking
- Performance management
- Behaviors science in sales and executive decision making
- Exit planning
- Sales and persuasion
- Leadership

### Additional Business Experiences

- Past NFL football player for the New England Patriots, Dallas Cowboys and San Diego Chargers, where he developed his initial speaking and C Suite relationship skills
- Worked in Trucking at Ryder Transportation Logistics for 9 years and was promoted 4 times to a regional manager position
- GM at a regional heavy construction equipment dealer where he learned contracting and sat on numerous industry boards
- Became a Certified Exit Planner (CEXP™) through Business International Institute in 2014

# Brandon White

Partner/Advisor/Director of Captive Programs



## 17 Years in Industry & 7.5 Years at InCite

### Experience

- Over ten years of strategy consulting and executive leadership experience across multiple industries, with an extensive track record in high-performance team building and operations management
- Strategy and innovation advisor to Fortune 500 companies
- Successful entrepreneur and integrator
- President of a produce merchandising and distribution company specializing in commissary retail business

### Industry Value Experience

- Recognized by a United Kingdom-based industry publication for global innovation in the captive insurance industry
- Has been invited to speak in 11 countries on the topic of risk management concepts/ideas
- Assist daily with delivering quantifiable risk management assessments & plans between brokers/agents and their clients

### Passion

- Faith and Family
- Studying and understanding risk management principles at all levels
- Knowing that our industry makes the global economy secure

### Unique Skills

- Simplification of complex ideas
- Real world application of risk management concepts
- Challenging existing thinking in our industry

### Additional Business Experiences

- Certified Insurance Counselor (CIC)
- Certified Risk Manager (CRM)
- Sits on the Board of Directors for eight insurance companies

# Bonita Argent

Partner/VP/Senior Advisor



## 32 Years in Industry & 11 Years at InCite

### Experience

- Started with Vertical Growth Network in 2000, joined forces with our U.S. partners in 2008 and became a partner at InCite in 2015
- Leadership role in one of the largest independent brokerages in Canada

### What do you do to give you the EDGE in your career?

“The best practice that gives me the edge is personal development and application. I believe that, no matter where I am in my career, I need to be learning and applying in order to stay relevant and bring value.”

### Industry Value Experience

- Involved in retention strategies on individual clients and books of business
- Re-distribution and perpetuation of books of business
- Building strong operation foundations through Virtual Operations Management Program

### Passion

- Leadership development
- Studying and understanding Productivity/Lean systems
- Enhancing client experience
- Personal growth and development

### Unique Skills

- Application of concepts in the real world
- Employee engagement
- Performance management
- Operations excellence

### Additional Business Experiences

- Canadian Accredited Insurance Broker (CAIB)
- Kolbe certified
- Lean Six Sigma Green Belt

# Gregg Goodmanson

Advisor/Virtual Sales Manager



## 18 Years in Industry & 12 Years at InCite

### Experience

- Advisor to CEO's and Executives
- Virtual Sales Manager
- Virtual Sales Leader
- Leadership Development

### What do you do to give you the EDGE in your career?

"I seek to take control of my morning. By taking control of my morning I have better control of my day!"

### Industry Value Experience

- Creator of the Virtual Sales Manager Program
- Creator of the Right Hire System
- Creator of the InCite Producer Validation System
- Interview Expertise – Interviewed hundreds of prospective employees, impacting every aspect of the business

### Passion

- Helping insurance agency businesses create a growth culture
- Helping individuals and organizations create clarity
- Helping people see opportunity in the face of adversity
- Striving for constant improvement
- Health and fitness

### Unique Skills

- Helping others discover how to focus on their highest and best potential
- Helping sales people overcome call reluctance
- Performance management
- Onboarding
- Employee engagement
- Leadership mentoring

### Additional Business Experiences

- Certified Call Reluctance Specialist – SPQ Gold Certified through Behavioral Sciences
- Certified Kolbe Specialist

# Drew Yancey

Advisor



## 10 Years in Industry & 6 Months at InCite

### Experience

- Over ten years of strategy consulting and executive leadership experience across multiple industries, with an extensive track record in high-performance team building and operations management
- Strategy and innovation advisor to Fortune 500 companies
- Successful entrepreneur and integrator
- President of a produce merchandising and distribution company specializing in commissary retail business

### What do you do to give you the EDGE in your career?

“One of the most effective practices over my career has been surrounding myself with mentors. By seeking out experienced and wise leaders who are focused on challenging me and holding me accountable, I have grown in ways that simply wouldn't have been otherwise possible!”

### Passion

- Executive leadership
- Organizational health and systems implementation
- Non-profit involvement
- International travel and development (35+ countries visited)

### Unique Skills

- Completed with distinction honors program in theology and philosophy at the University of Oxford
- Master of Divinity from Denver Seminary, an MBA from Texas A&M University, and a PhD in religious and management ethics at the University of Birmingham (UK)
- International speaker on strategy, organizational health and innovation
- Analytical problem solver and new value creator

### Additional Business Experiences

- Former Director of Strategy for a Top 50 Foodservice Distributor, helping lead the company through its acquisition by a Top 5 Distributor
- Entrepreneur-in-residence at Peak Solutions, a consulting firm focused on strengthening organizational health in management teams

# Maura Derstein

Partner/VP Operations



## 22 Years in Industry & 4.5 Years at InCite

### Experience

- Partner/Advisor since 2014
- Lacher - Insurance – Chief Client Experience Officer – been with firm since 1997
- InCite Performance Group – Partner/Advisor since 2014
- Lacher - Business Consulting – Partner since 2019

### What do you do to give you the EDGE in your career?

“Reading – Learning – Listening. Continuous learning through books, blogs and podcasts. I am a podcast junkie. Seeking counsel from colleagues and people I respect. Keeping my ears open and really listening so I can learn, guide and lead.”

### Industry Value Experience

- Advised and acquired clients in Commercial, Benefits and Personal insurance
- Implemented and realized results for clients with cost containment, organizational health and risk strategies
- Develop and create remarkable client experience platforms

### Passion

- My faith, family and friends
- Helping teams grow and imagine what’s possible
- Creating moments

### Unique Skills

- Client experience creation
- Drive strategy to tactical implementation to results
- Communication strategy development
- Organizational clarity and health

### Additional Business Experiences

- Sales leadership in retail environments
- Certified Insurance Counselor (CIC)
- Board member, hospital foundation

# Your Relationship Management Team



## **Renee Flewelling**

### **Client Relationship Manager & Events Coordinator**

Renee manages the work lives of Bonita Argent and Brandon White, plans some really great events and tries to answer ALL the questions. Renee's StrengthsFinder identifies her as Learner / Harmony / Maximizer / Input / Deliberative, and her Kolbe is 8-7-5-2. Translation: she likes to learn, look for areas of agreement, transform ideas from strong into superb, is inquisitive and careful & deliberate - which explains why she tries to answer ALL the questions.



## **Ernestine Hall**

### **Client Relationship Manager**

Ernestine has been with InCite for 6 years, and in that time has clearly demonstrated her passion around client experience. She works with our Advisors to keep them focused on highest and best use of their talents and ensures our members have everything they need to succeed. Great organizational skills and follow-thru means Ernestine is always ready to assist with projects, events and online sessions.



## **Maxwell Jordan**

### **Director of Client Engagement**

Maxwell Jordan thrives when juggling rapidly changing priorities. He is known for taking risks that are grounded in practical realities. Max doesn't mess around with what has always been done, but tempers a trial-and-error approach by strategizing options.

## Nametags



**Core:** Training and introduction of concepts and initial implementation of critical strategies and tactics of growth. This phase will emphasize beliefs and behaviors as well as Leadership factors.



**Acceleration:** Implementation is the key to this track. Your Advisor will assist in identifying the growth strategies that need to be put in place to get maximum results. Additional private training and custom implementation will be included in this phase of development.



**Mastery:** When the results are consistent due to execution in the critical areas of growth, you will enter the Mastery track. The Mastery track will include custom modification, mastery classes, custom coaching, private online sessions, and being able to tap into the different advisors in their unique skill area.

## Lanyards

-  **Yellow:** Advisory Board Member
-  **Green:** New or Potential Member
-  **Black:** Member
-  **Red:** Strategic Partner

## Advisory Board Members

- **Brian Nielsen**, Drayden Insurance Ltd.
- **Russ Martorana**, FBinsure
- **Brett Kemp**, Flood and Peterson
- **Doug Mills**, Gillis, Ellis & Baker, Inc.
- **Myron Romaniuk**, Gillons' Insurance Brokers Ltd.
- **Dave Reidy**, Henderson Insurance Inc.
- **Kelly Miller**, Professional Insurers Agency, LLC
- **Bill Rue Jr.**, Rue Insurance
- **Don Mills**, SIA Group
- **Garry Watts**, WA Insurance Group
- **Tom Hickey**, Wedgwood Insurance Ltd.

# AGENDA

**TUESDAY, APRIL 23, 2019**

7:00pm	Welcome Reception	Florida Ballroom Foyer
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**WEDNESDAY, APRIL 24, 2019**

7:00am - 8:00am	<b>Breakfast</b>	II Terrazzo
8:00am - 8:30am	<b>Welcome &amp; Opening</b>	Florida Ballroom
8:30am - 9:30am	<b>The EDGE – Larry Linne</b>	
9:30am - 10:00am	<b>Table Discussion</b>	
10:00am - 10:15am	<b>Break</b>	Foyer
10:15am - 11:00am	<b>It's Your Job...Develop Your Talent – Gregg Goodmanson</b> As a leader, it is your responsibility to develop each person, every day. Learn how to Engage, Elevate and Escalate the Talent in your Organization (this is also a great way to attract talent).	Florida Ballroom
11:00am - 11:20am	<b>Table Discussion</b>	
11:20am - 12:00pm	<b>What is Broken with Innovation and How Do We Fix it? – Drew Yancey</b> Despite millions of dollars spent on new products and technology, agencies are struggling to innovate. We will unpack why this is the case and unveil solutions to help agencies drive results.	
12:00pm - 1:00pm	<b>Lunch</b>	II Terrazzo
<b>AFTERNOON WORKSHOPS</b>		
<b>The EDGE Series – Getting Past the Commodity Cycle and How to Create Something that is Truly Different</b>		
1:00pm - 2:00pm <i>Three Workshops run concurrently, choose ONE to attend</i>	<b>PERSONAL – Bonita Argent</b> How do you truly differentiate in a highly commoditized and heavily advertised space? Learn how you can develop and promote unique ways of marketing and delivering results for your clients. Learn to change the conversation. Designed for both High Value and Standard Personal Insurance clients.	Meeting Room 5
	<b>COMMERCIAL – Brandon White</b> Do your clients know they could own an insurance agency? You have heard of quantification, but have you created a clear separation from your competitors? Is your team consistently developing a long term strategy with clients that will give them ultimate ownership of their spend? Learn how to get past selling insurance and gain clear separation by delivering results that matter. Learn to change the conversation.	Florida Ballroom
	<b>EMPLOYEE BENEFITS – Maura Derstein</b> Migration from the Value-Add Selling approach to a true Results-Oriented, Total Rewards and Return on Human Capital Strategy. Reduce volatility and help your clients envision a new reality with their healthcare and benefits. Learn to change the conversation.	Meeting Room 6
2:00pm - 2:10pm	<b>Break</b>	Foyer
2:10pm - 4:00pm	<b>Peer Group Roundtable Discussions –</b> Bring ideas and examples of how you are getting The EDGE in Operations, Sales, Innovation, Retention, Performance Management and Leadership. Breaks will be taken at the group's discretion – food and beverage will be available in the Foyer.	Florida Ballroom
4:00pm - 4:10 pm	<b>Closing Remarks - Session Adjourns</b>	

# AGENDA

THURSDAY, APRIL 25, 2019

7:00am - 8:00am	<b>Breakfast</b>	II Terrazzo
8:00am - 8:30am	<b>InCite Updates &amp; Expectations</b> – <i>Larry Linne &amp; Brandon White</i>	Florida Ballroom
8:30am - 9:20am	<b>Ironman of Leadership</b> – <i>Scott Hackman, Scott Hackman Ventures</i> If you want to get The EDGE on leadership, you must improve your Interpersonal Fitness. Learn the psychology and training regimen to build your endurance.	
9:20am - 9:40am	<b>Table Discussion</b>	
9:40am - 10:00am	<b>Break</b>	Foyer
<b>MORNING WORKSHOPS</b> <b>The EDGE Series – Productivity</b>		
10:00am - 10:55am <i>Three Workshops run concurrently, choose ONE to attend</i>	<b>BECOMING LEAN IS NOW REAL</b> – <i>Bonita Argent</i> Bonita continues through her black belt certification and the development of improved productivity through lean systems and strategies. After 18 months of education and implementation, her teaching on LEAN is not a nice to have, it is a MUST! Learn how Bonita is making big, quantifiable impact with agencies actively involved in lean implementation.	Meeting Room 5
	<b>PRODUCER PRODUCTIVITY</b> – <i>Gregg Goodmanson</i> Producers have only so much time to sell. Increasing success within the time available has to be one of our priorities. Utilizing team structures, leadership, organizational systems, training, motivation and other tools are critical to get the best results out of your Production team.	Meeting Room 6
	<b>PRODUCTIVITY IN EXECUTION</b> – <i>Drew Yancey</i> Drew will introduce the details behind his intellectual property that is blending his experience from Clareo (innovation consulting to Fortune 100 companies) and EOS™. If you want to see increased speed and results in execution, this session will teach you how!	Florida Ballroom
10:55am - 11:10am	<b>Break</b>	Foyer
<b>MORNING WORKSHOPS</b> <b>The EDGE Series - Sales</b>		
11:10am - 12:00pm <i>Three Workshops run concurrently, choose ONE to attend</i>	<b>STAND OUT</b> – <i>Larry Linne</i> How to Brand, Package and Deliver your Approach in a Differentiated, Compelling and Persuasive Way.	Meeting Room 5
	<b>THE SCIENCE OF NEGOTIATION</b> – <i>Brandon White</i> It is science, not just skill. Learn how to use and apply behavioral science techniques to have a higher success and close rate.	Meeting Room 6
	<b>CONVERSION SUCCESSES</b> – <i>Gregg Goodmanson</i> Listen to how fellow InCite members are taking advantage of the Conversion Series Videos and converting more appointments.	Florida Ballroom
12:00pm - 1:00pm	<b>Lunch</b>	II Terrazzo

# AGENDA

THURSDAY, APRIL 25, 2019

AFTERNOON WORKSHOPS The EDGE Series - FINANCIAL		
1:00pm - 1:55pm <i>Three Workshops run concurrently, choose ONE to attend</i>	<b>OPERATIONAL PROFIT – Bonita Argent</b> Make money on Operational Efficiency and Leadership. Bonita & Maura have helped a few agencies build highly effective and profitable operations teams in our network. Learn how they have organized the process to get operations running at elite performance through structure, teams, learning, process and more.	Florida Ballroom
	<b>YOU HAVE OPTIONS – Larry Linne</b> Expand your thinking in perpetuation. Learn how to identify viable choices and understand which ones make sense for your organization.	Meeting Room 5
	<b>FINANCIAL LEADERSHIP – Drew Yancey</b> Improve the financial edge of your company by employing governance, expense management and tough decision-making techniques.	Meeting Room 6
1:55pm - 2:05pm	<b>Break</b>	Foyer
2:05pm - 3:00pm	<b>The Power of Alignment – Brandon White</b> Alignment means Results. This is the secret sauce to your organization achieving unbelievable heights!	Florida Ballroom
3:00pm - 4:00pm	<b>How to Help Your Clients Get The EDGE – Maura Derstein</b> Learn how to engage and deliver results to your clients on a different level. InCite members will share non-traditional ways they are making a difference in their client's organization and delivering real results.	
4:00pm	<b>Meeting Adjourns</b>	

# ACCOUNT MANAGER MASTERY 5

JUNE 12-13, 2019  
CHICAGO, IL

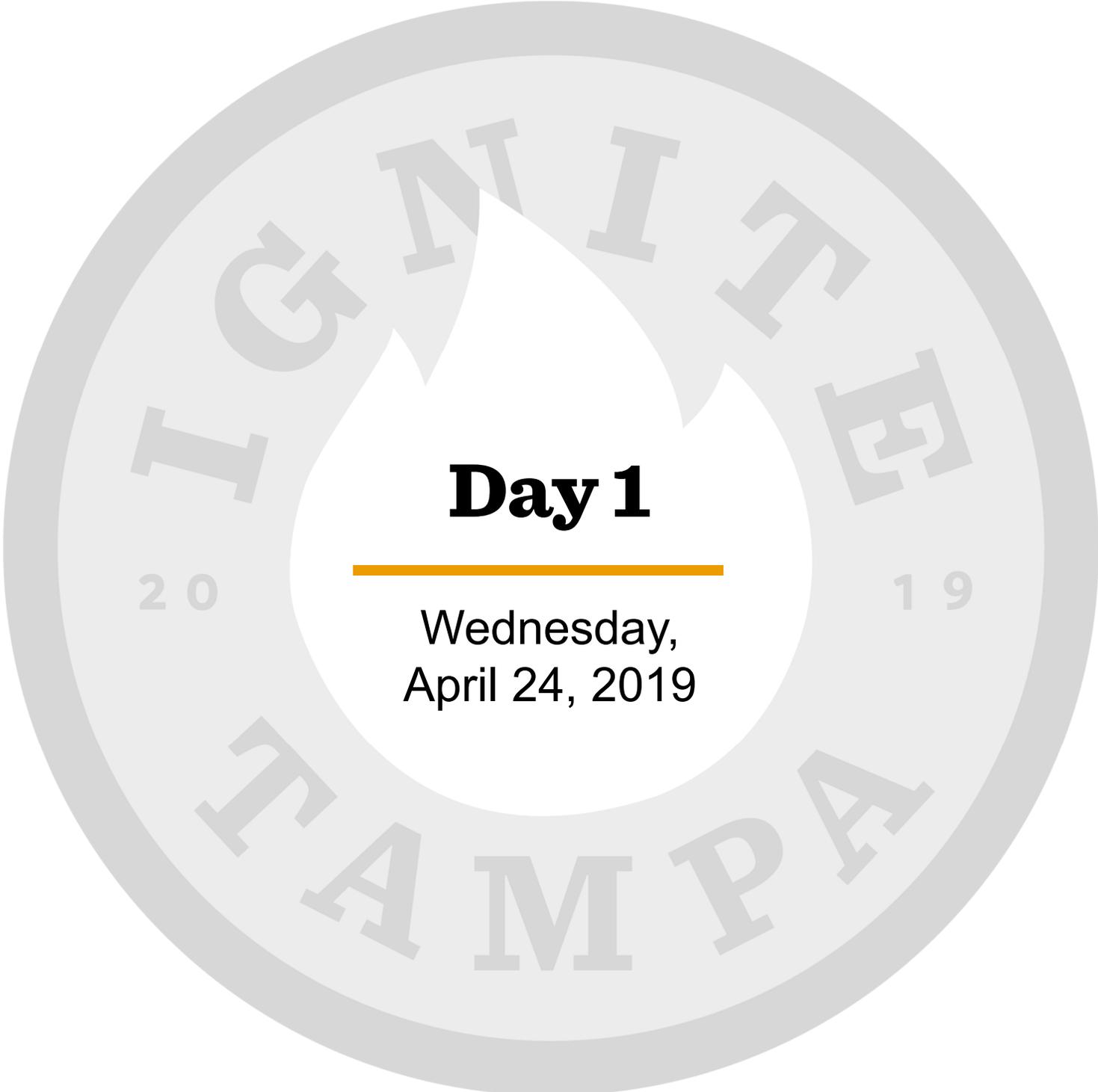


PRESENTED BY  
BONITA ARGENT & MAURA DERSTEIN

REGISTER AT  
[WWW.INCITEPG.COM](http://WWW.INCITEPG.COM)



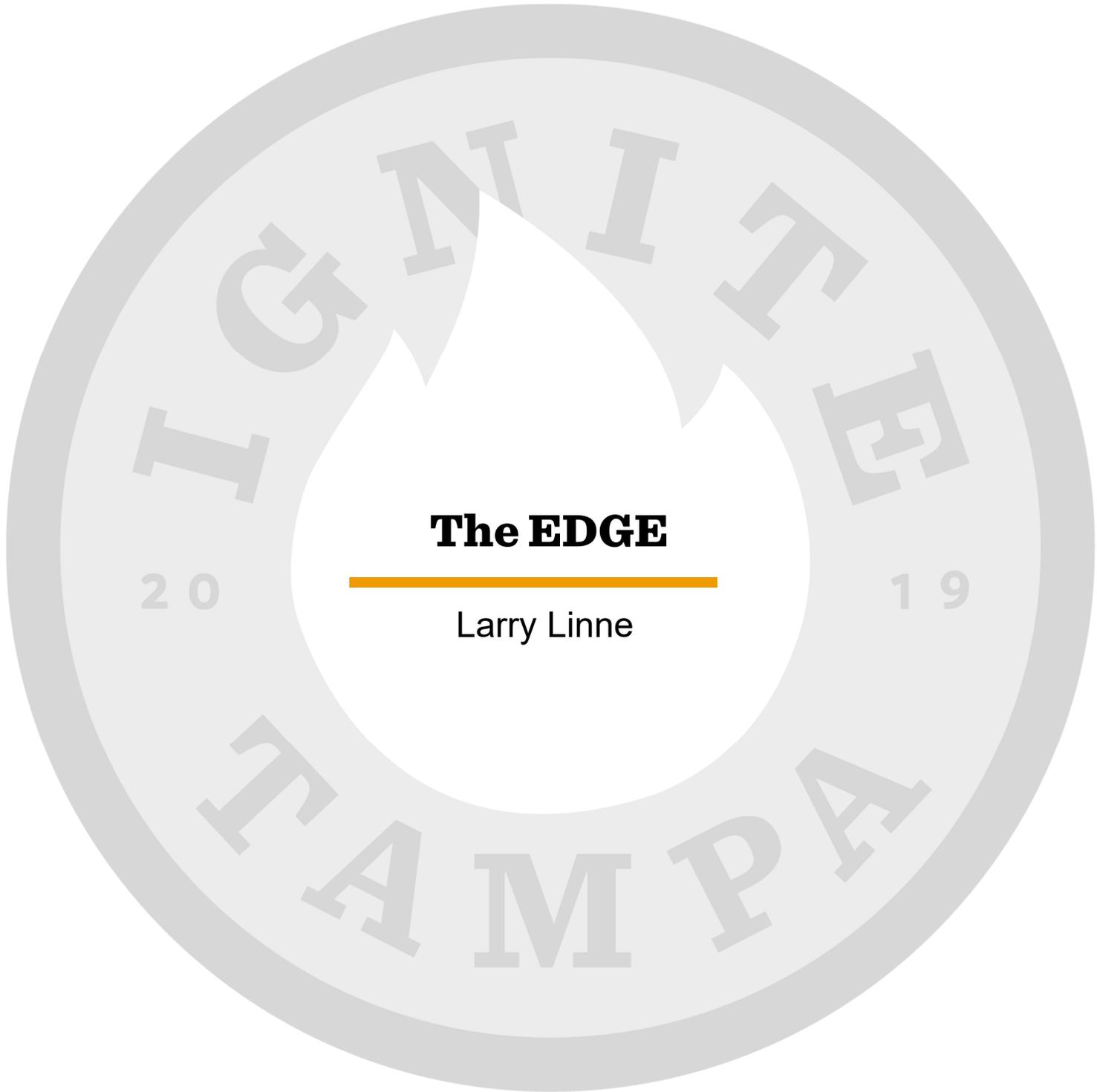
**INCITE.**  
PERFORMANCE GROUP

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# Day 1

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Wednesday,  
April 24, 2019



**The EDGE**

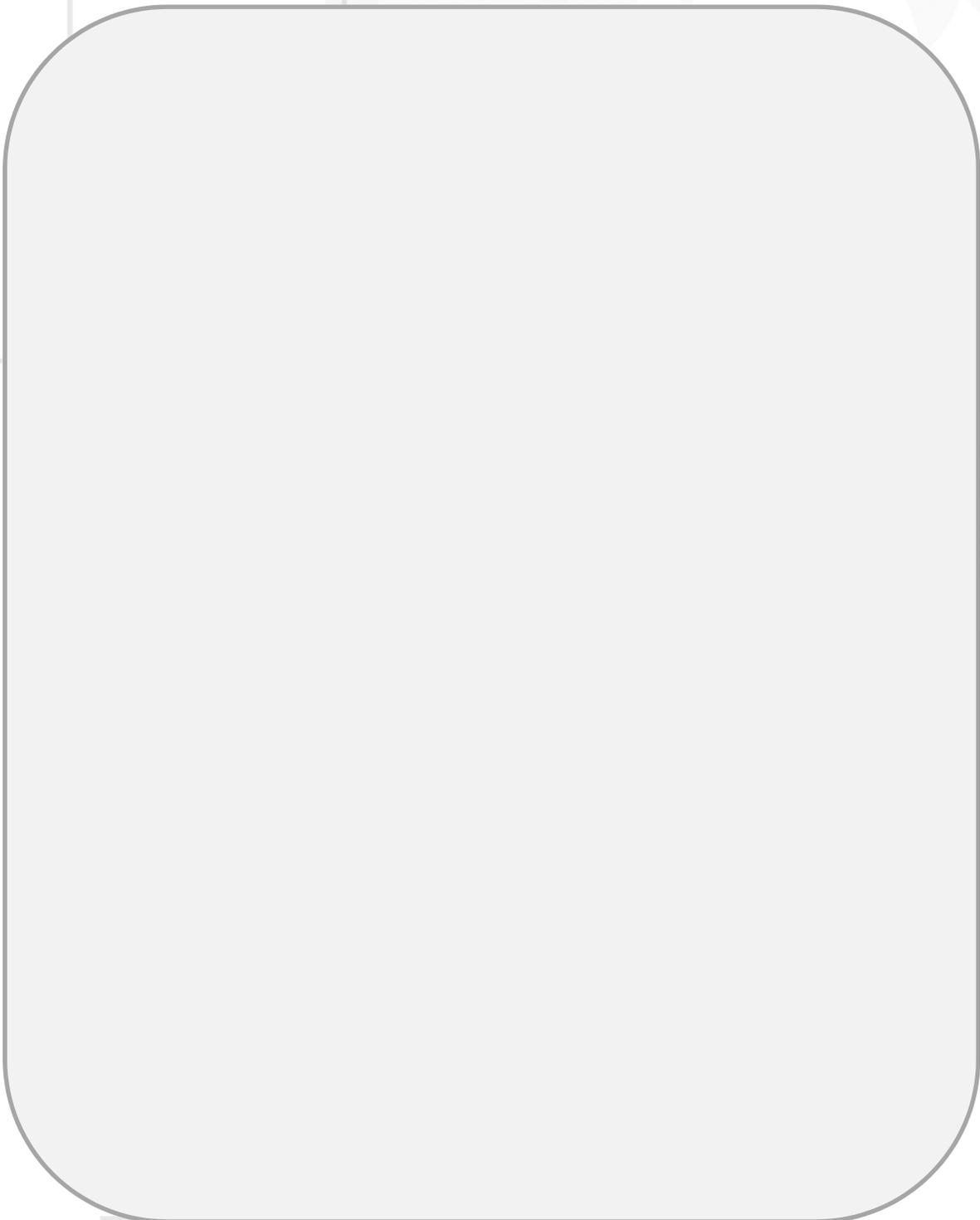
20

19

Larry Linne

# The **EDGE**

– *Larry Linne*



# Table Discussion on The EDGE



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**It's Your Job...  
Develop Your Talent**

Gregg Goodmanson

# **It's Your Job...Develop Your Talent**

– Gregg Goodmanson

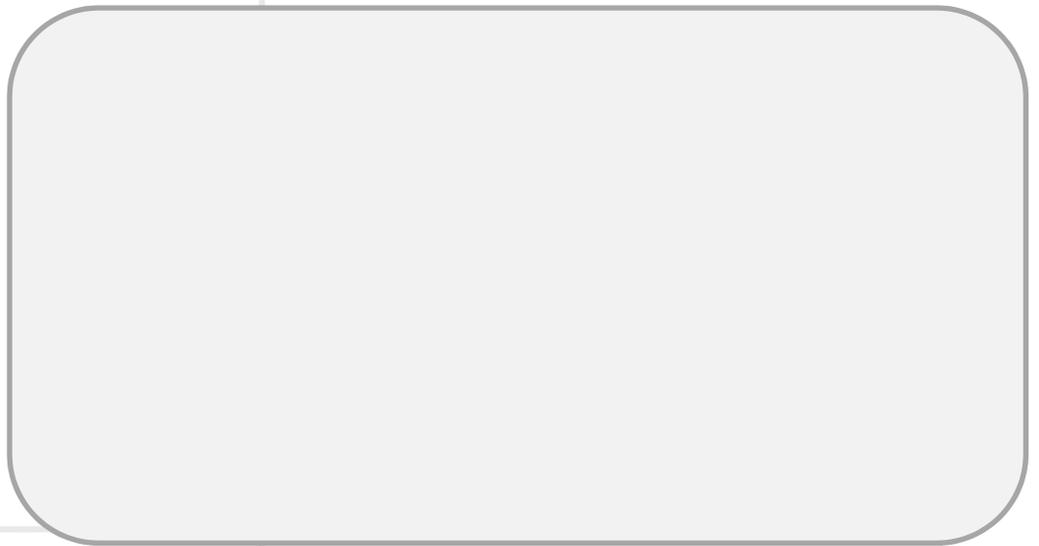
## **The training to learning conundrum**

*\$84 billion spent on training in 2018. What is the ROI?*



## **The Learning Process**

*How do we move to and stay in unconscious competence?*



# It's Your Job...Develop Your Talent

– Gregg Goodmanson

## The steps

*It's time to execute...really!*



## Final thoughts



**Table Discussion on It's Your Job...  
Develop Your Talent**



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# FIRST INSURANCE® FUNDING

A WINTRUST COMPANY

## More than Premium Finance... Complete Financial Solutions

FIRST is proud to partner with InCite member agencies to offer financial solutions designed to help you increase your value and improve your competitive edge:

- Flexible premium financing with pre-approved rates and competitive terms
- Advanced online quoting and account management system
- Multiple payment options including electronic down payments by credit card & ACH
- Exclusive pay-as-you-go premium finance solution for Workers' Comp policies
- Custom billing and payment programs
- Agency Lending for perpetuation, expansion, equipment and new producer hires

To learn more about how to increase agency revenue and create operational efficiencies, contact



US  
Justin Berry, Regional President  
justin.berry@firstinsurancefunding.com  
602-818-7166



CANADA  
David Caringi, SVP - National Sales  
david.caringi@firstinsurancefunding.ca  
416-859-2522

[www.InCitePG.com](http://www.InCitePG.com)  
Where you will find the latest in  
**Training - Resources - Tools**

A large, light gray circular logo in the background. The text 'IGAT ITP' is at the top, 'TAMPA' is at the bottom, '20' is on the left, and '19' is on the right. A white flame shape is in the center.

# **What is Broken with Innovation and How Do We Fix it?**

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Drew Yancey

# **What is Broken with Innovation and How Do We Fix it?**

*– Drew Yancey*

**What innovation challenges can you relate to at your agency?**



Empty rounded rectangular box for response.

**What key words would you use to describe the innovation culture at your agency?**

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**What benefits can you envision at your agency from a “culture of execution”?**

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# **Afternoon Workshops**

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The EDGE Series – Getting Past  
the Commodity Cycle and How  
to Create Something that  
is Truly Different



# THE EDGE SERIES

**PERSONAL**

– *Bonita Argent*

**What is differentiation?**



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**Innovation**

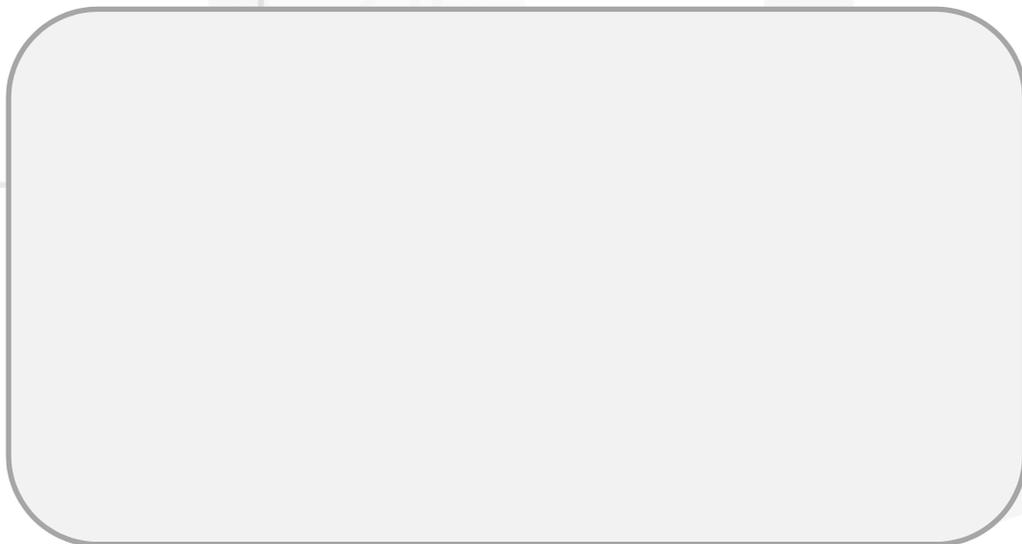
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# THE EDGE SERIES

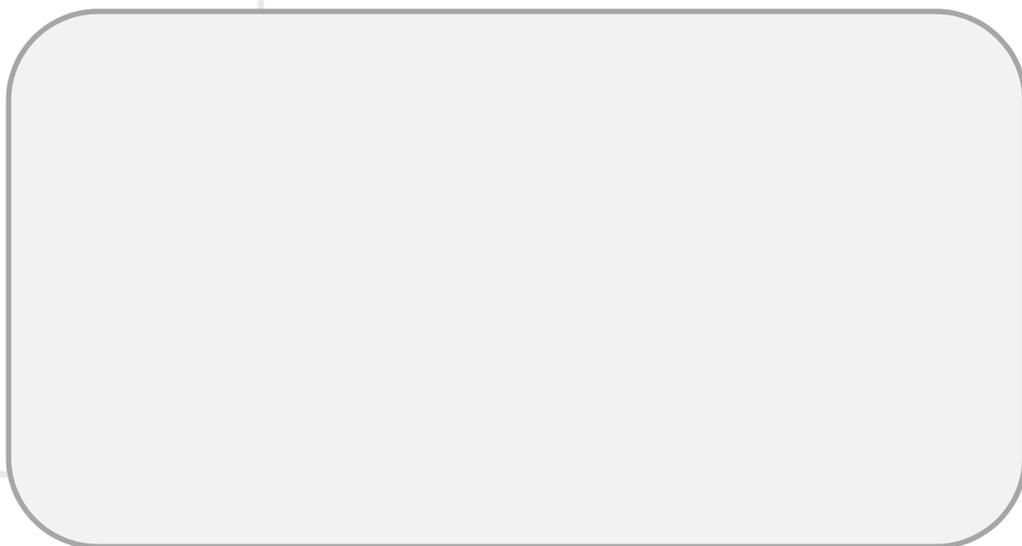
**PERSONAL**

– *Bonita Argent*

**Tools/resources**

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**Group sharing**

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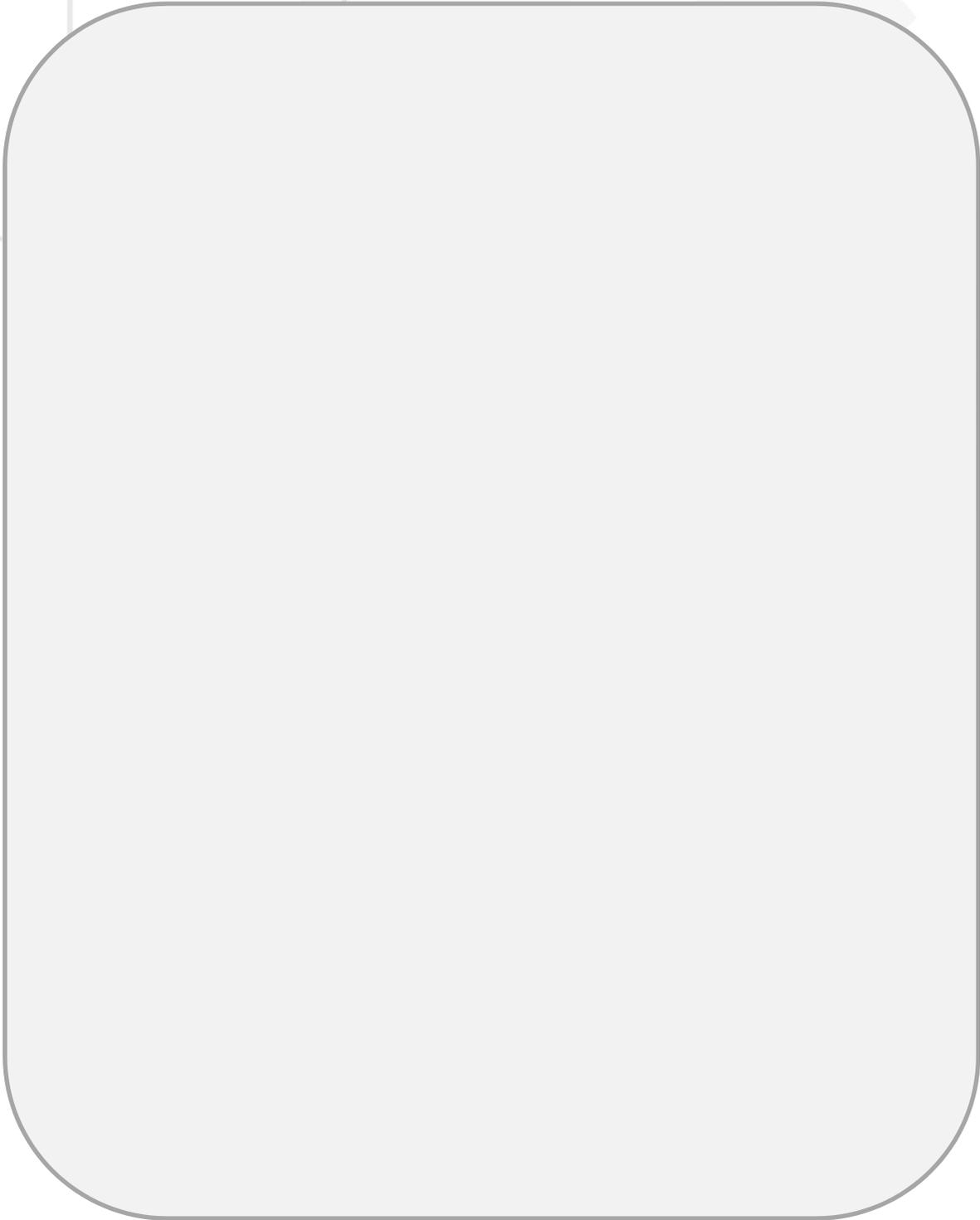
**COMMERCIAL**  
**The EDGE Series**

Brandon White

# THE EDGE SERIES

## COMMERCIAL

– *Brandon White*





**EMPLOYEE  
BENEFITS**  
**The EDGE Series**

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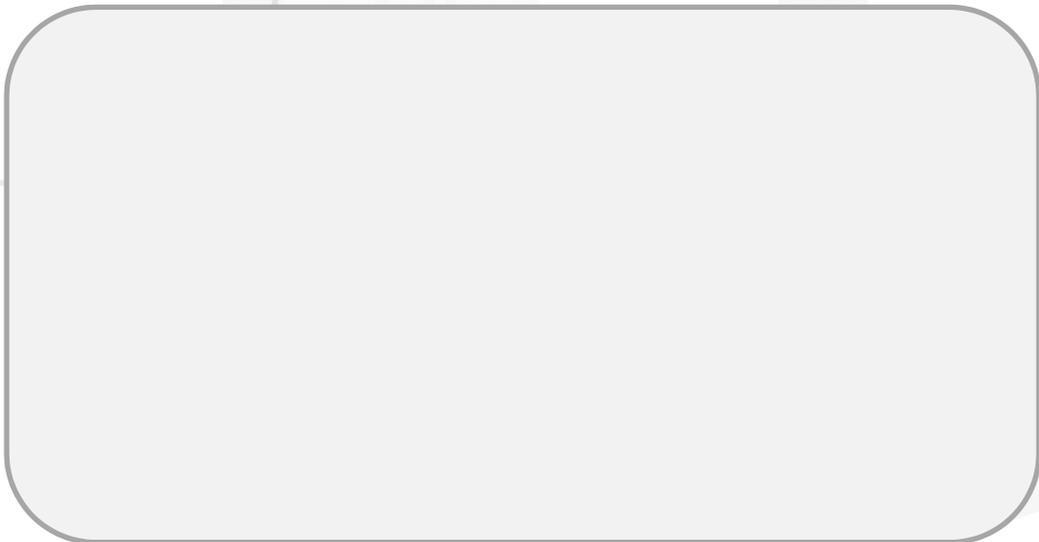
Maura Derstein

# THE EDGE SERIES

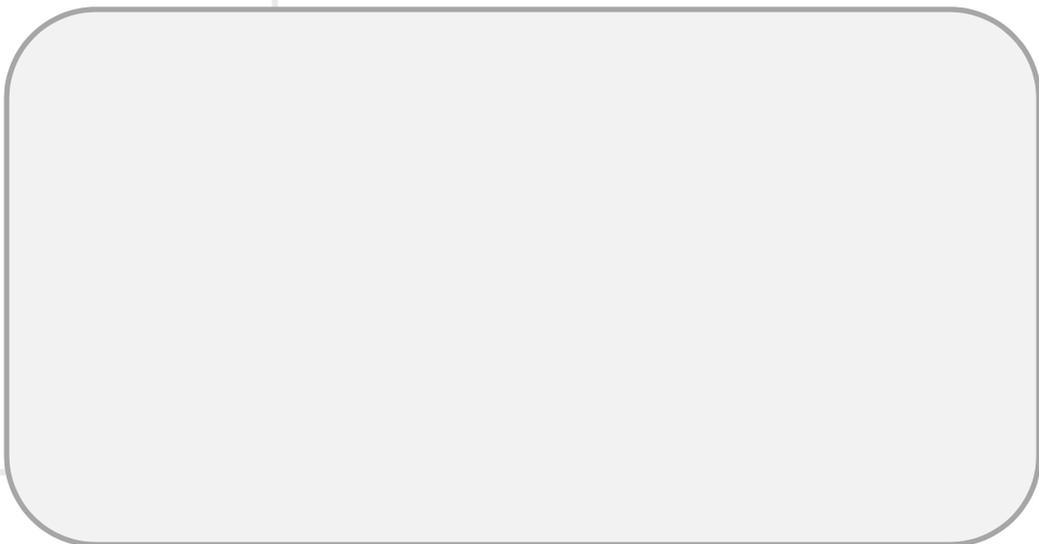
## EMPLOYEE BENEFITS

– Maura Derstein

### Bias and perception



### Cataclysmic shift



# THE EDGE SERIES

## EMPLOYEE BENEFITS

– Maura Derstein

### RIGHT conversations



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**Benefits to rewards to results**

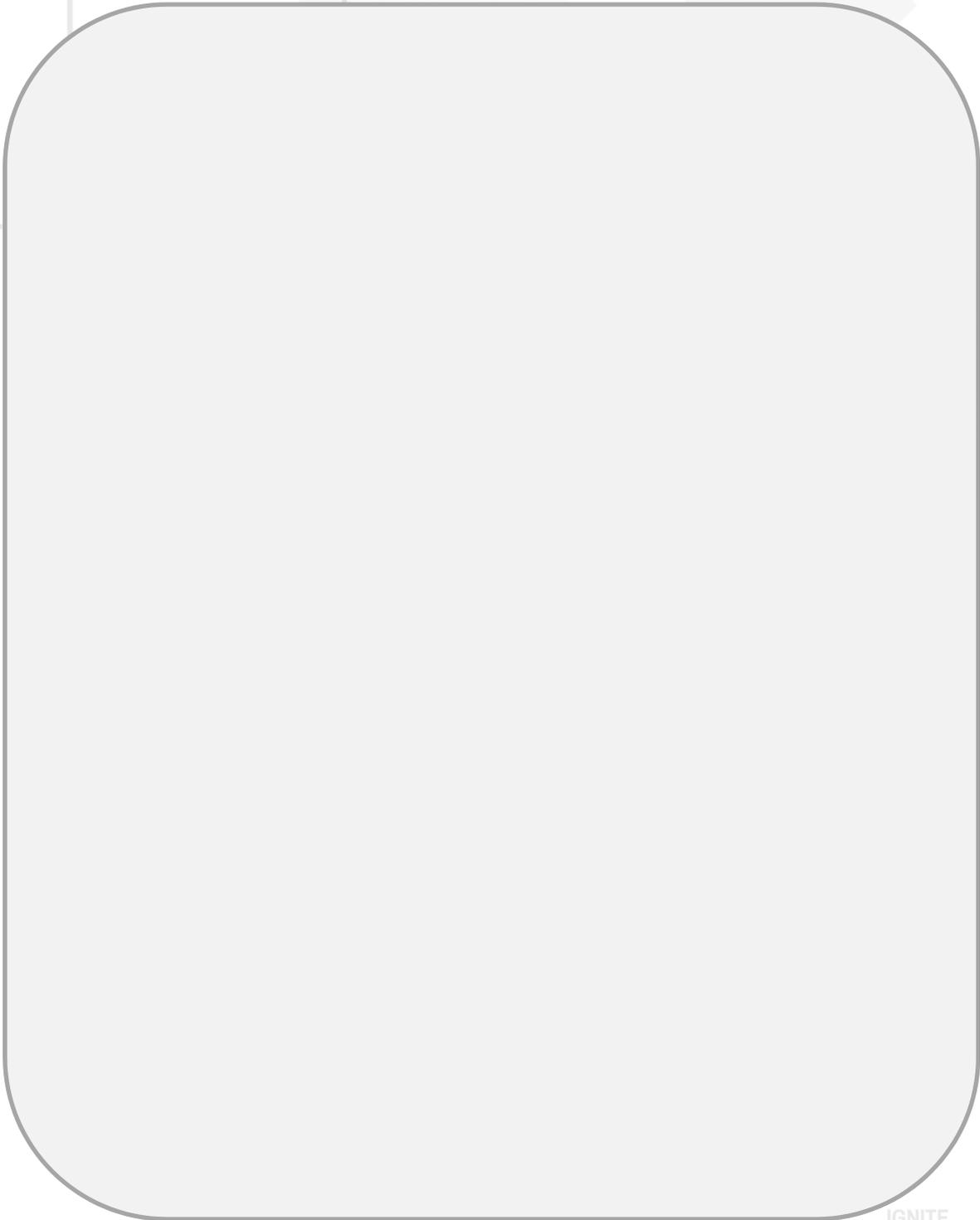
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**Total rewards**

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# THE EDGE SERIES

## PEER GROUP ROUNDTABLE DISCUSSIONS



# RD ADVISORY GROUP, LLC

## Agency CFO

Virtual. Fractional. Scalable. Customizable.

## Found! Money lying on the floor of your agency

### **Focused Agency Expertise!**

That's what insurance agencies need from their financial experts.  
That's what we uniquely offer.

RD Advisory Group's Agency CFO is an insurance agency focused solution. Our unique experience gives us the inside knowledge to serve your needs with the added benefit of an outside perspective. We can see the money lying on the floor most others miss!

*Building Profitable and Transferable Independent Agencies*



*We're insiders  
with an outside  
point of view!*

## How much will you collect?



For more info, please contact Don direct at (315) 368-8662 or visit [www.RDAdvisoryGroup.com](http://www.RDAdvisoryGroup.com)

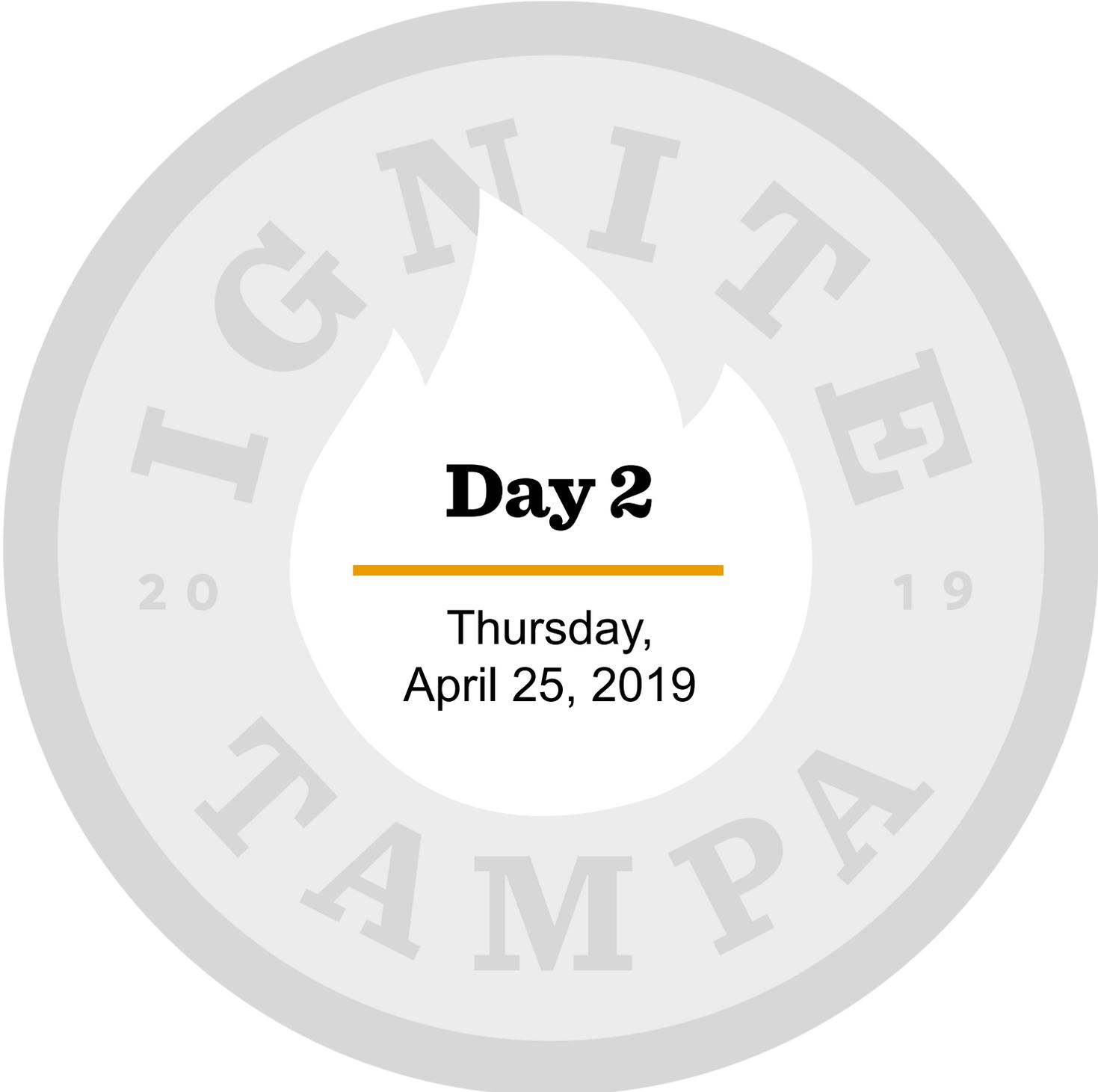
# Expert Resources. Optimal Solutions.

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Partnering with InCite Performance Group  
for over 10 years.



RT New Day, a division of R-T Specialty, LLC, is a specialty resource for agents and brokers, assisting them and their clients find appropriate, high-quality environmental and construction-related professional liability insurance coverages. RT New Day offers agents and brokers single-point access to an ample portfolio of products and services provided by the nation's largest environmental and professional liability insurance providers. In California: R-T Specialty Insurance Services, LLC License #0G97516.



**Day 2**

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Thursday,  
April 25, 2019

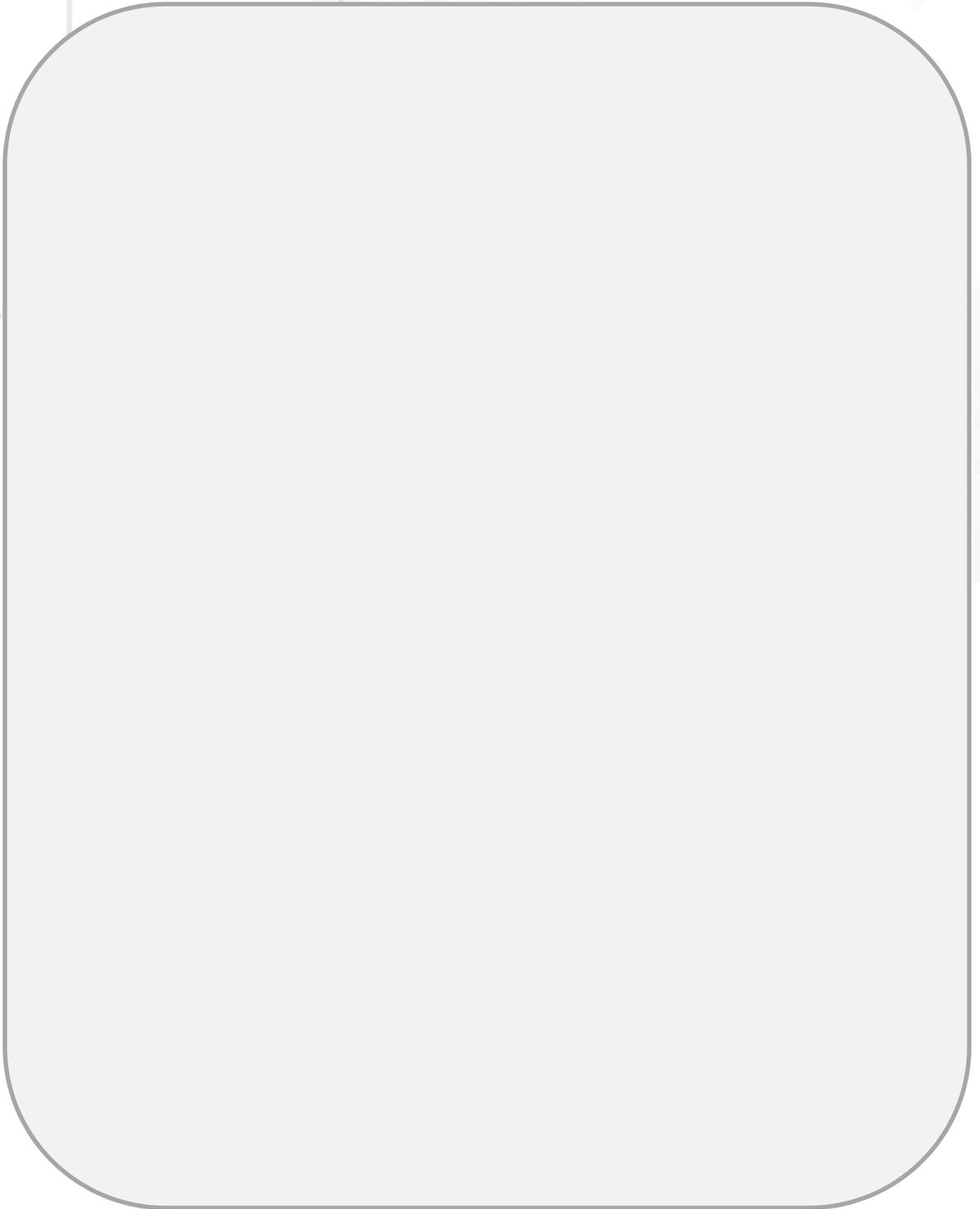


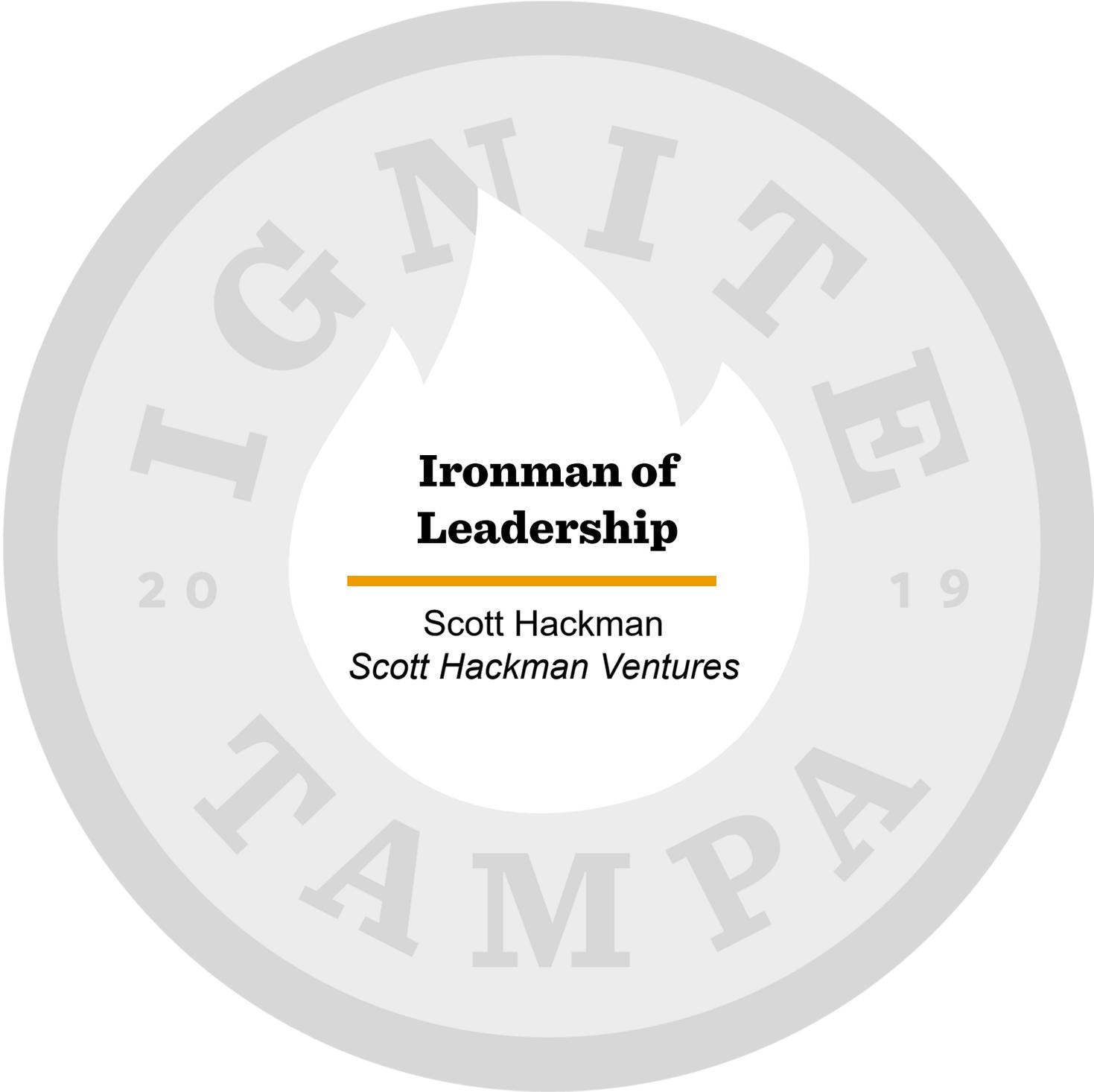
**InCite Updates  
& Expectations**

Larry Linne & Brandon White

# **InCite Updates & Expectations**

*– Larry Linne & Brandon White*



A large, light gray circular graphic with a white flame shape in the center. The words "IRONMAN" and "TEAMPA" are written in a large, bold, sans-serif font around the top and bottom of the circle, respectively. The numbers "20" and "19" are positioned on the left and right sides of the circle. In the center of the white flame, the text "Ironman of Leadership" is written in a bold, black, sans-serif font. Below this text is a thick, horizontal orange line. Underneath the orange line, the name "Scott Hackman" and the company name "Scott Hackman Ventures" are written in a smaller, black, sans-serif font.

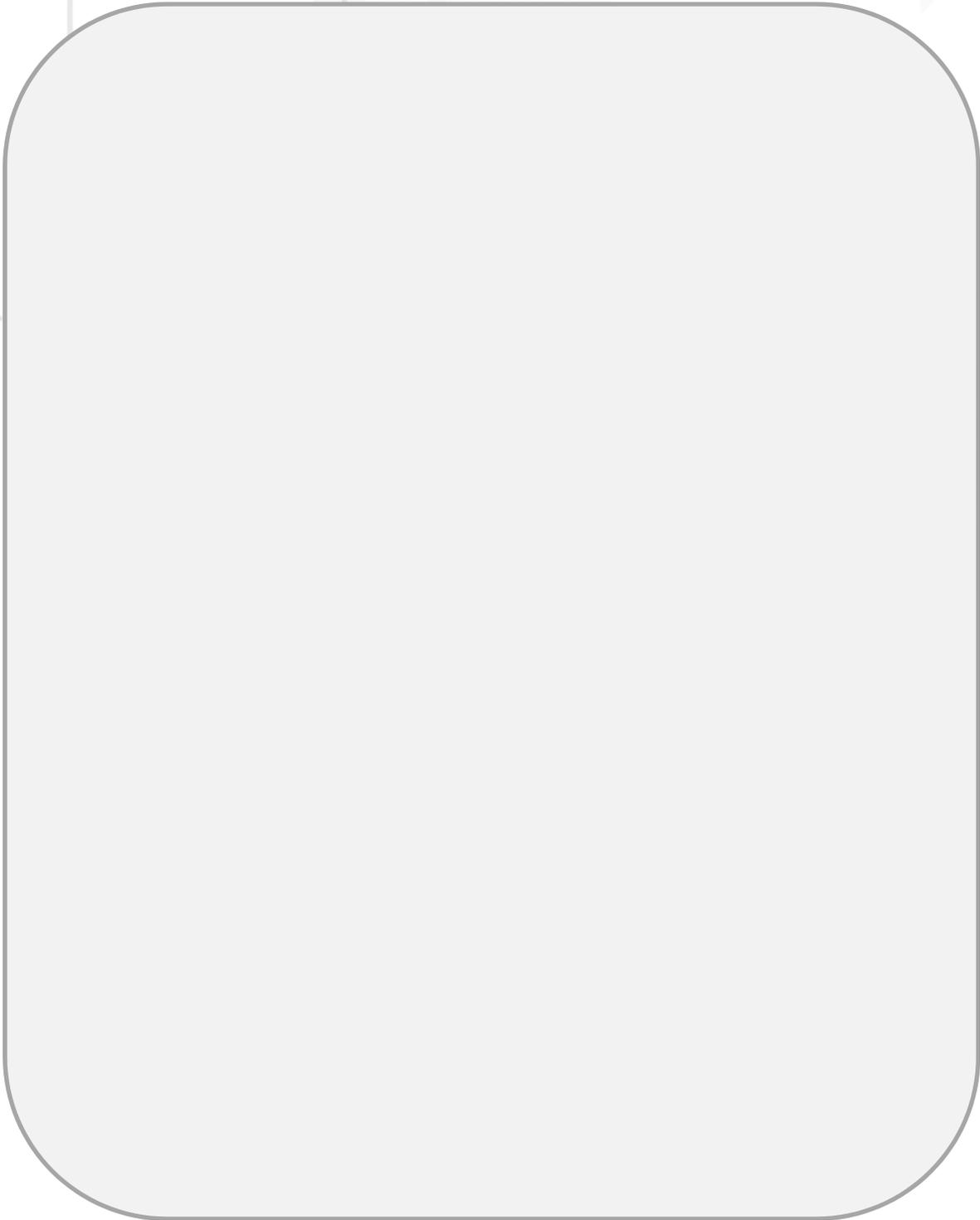
**Ironman of  
Leadership**

Scott Hackman  
*Scott Hackman Ventures*

# Ironman of Leadership

– Scott Hackman

Scott Hackman Ventures



# Table Discussion on Ironman of Leadership



A large, light-gray rounded rectangle with a thin black border, intended for a table discussion on leadership. The rectangle is currently empty.



# INCITE SALES

*Register at [www.incitepg.com](http://www.incitepg.com).*

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- OCTOBER 8-9: TORONTO, ON
- NOVEMBER 13-15: FORT MYERS, FL

This seminar is designed to teach Producers to sell *how* they work and to learn the keys to differentiate themselves in the marketplace.



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# TRAIN- THE- TRAINER



*This program gives you the tools and resources to facilitate workshops and coach people in your agency, using lean strategies.*

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The background features a large, light gray watermark of the University of Tampa logo. The logo is circular and contains the text "UNIVERSITY OF TAMPA" around the perimeter and "1920" in the center. The text is arranged in a circular path, with "UNIVERSITY" at the top, "OF TAMPA" at the bottom, and "1920" in the middle.

# **Morning Workshops**

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The EDGE Series – Productivity



**BECOMING LEAN  
IS NOW REAL**

Bonita Argent

# THE EDGE SERIES

## BECOMING LEAN IS NOW REAL

– *Bonita Argent*

### Culture vs. implementation



### Why LEAN?

# THE EDGE SERIES

## BECOMING LEAN IS NOW REAL

– *Bonita Argent*

### What is LEAN?



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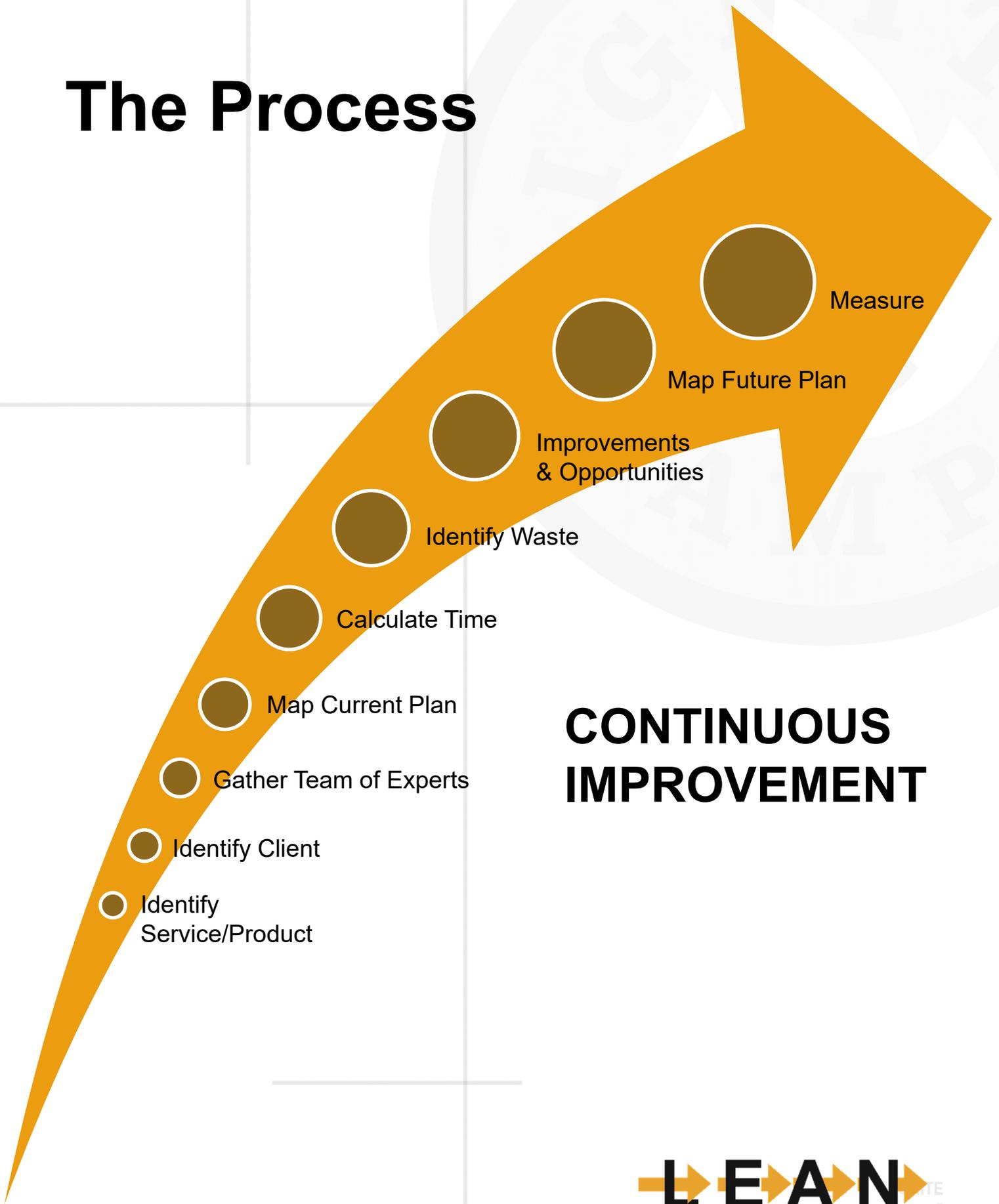
### Overcoming misconceptions

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### The benefits

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# The Process



## CONTINUOUS IMPROVEMENT

# Tools/Resources

- Lean Culture Assessment
- Lean Waste List
- Leading Change – The Process
- Kolbe Team Synergy Reports
- Impact Effort Matrix
- Root Problem Brainstorming Tool
- Strategic Scoping
- Lean Mapping Tool (Current State)
- Future Opportunities/Improvements Tool

At first glance, premium finance companies may all seem alike. But, beyond competitive rates and flexible terms, FIRST Insurance Funding (FIRST) offers features and services that will shine light on new opportunities for your agency.

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We offer the most options for down payments and monthly installments in the industry. Your insureds can make payments by mail, phone, or online using check, ACH, or credit card. We accept American Express, MasterCard, VISA and Discover with no limit.



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A large, light gray watermark of the IGT Tampa logo is centered on the page. The logo consists of a circular border containing the text "IGT TAMPA" and the years "20" on the left and "19" on the right. In the center of the circle is a stylized flame shape.

**PRODUCER  
PRODUCTIVITY**

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Gregg Goodmanson

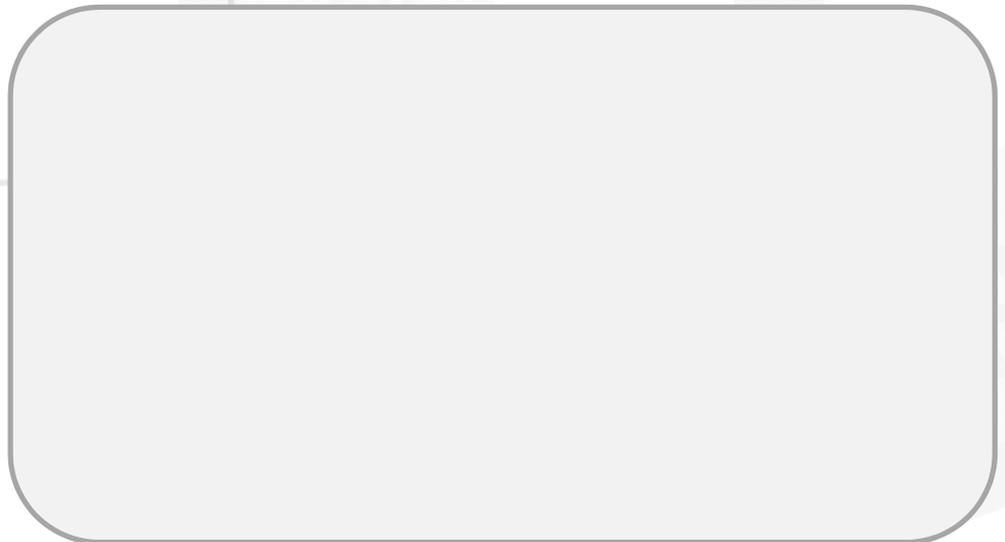
# THE EDGE SERIES

## PRODUCER PRODUCTIVITY

– Gregg Goodmanson

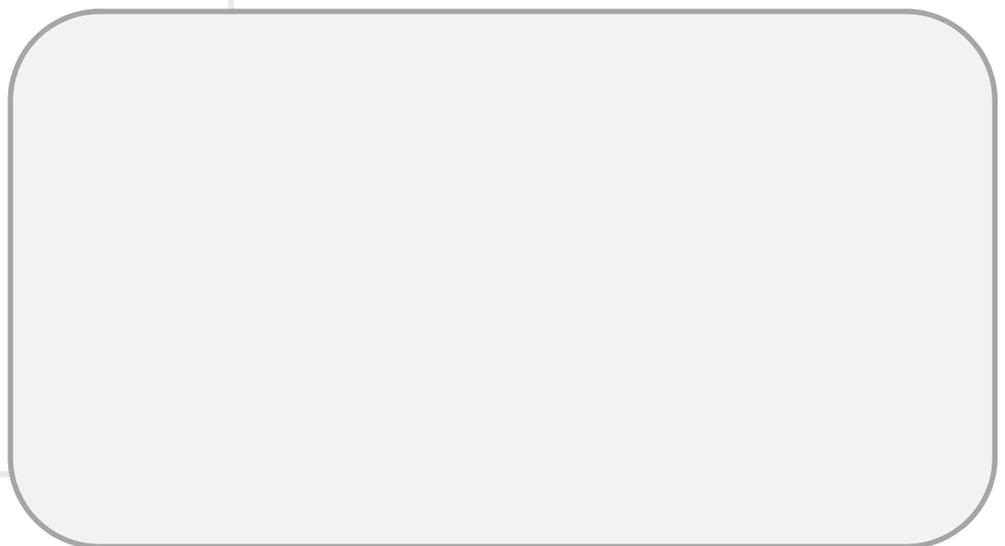
### Challenges to producer growth and productivity

- Service Work
- Skills and Behaviors
- Leadership
- Time Management



### Key solutions

- Know Yourself
- Take Control of your Morning – Create Rituals
- Service work
  - New level of WHY
  - Requirements turn into bad habits that must be broken
  - Immediate vs. future reward



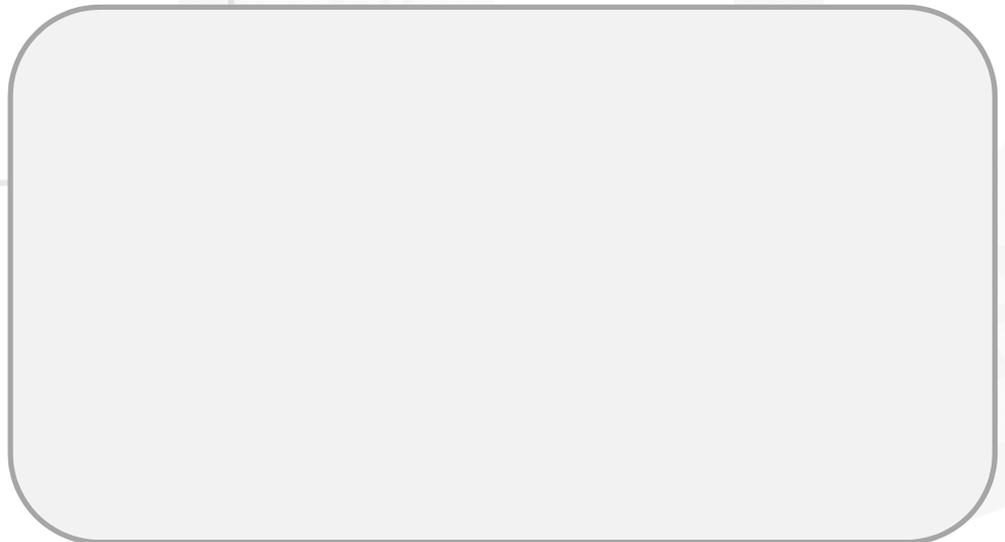
# THE EDGE SERIES

## PRODUCER PRODUCTIVITY

– Gregg Goodmanson

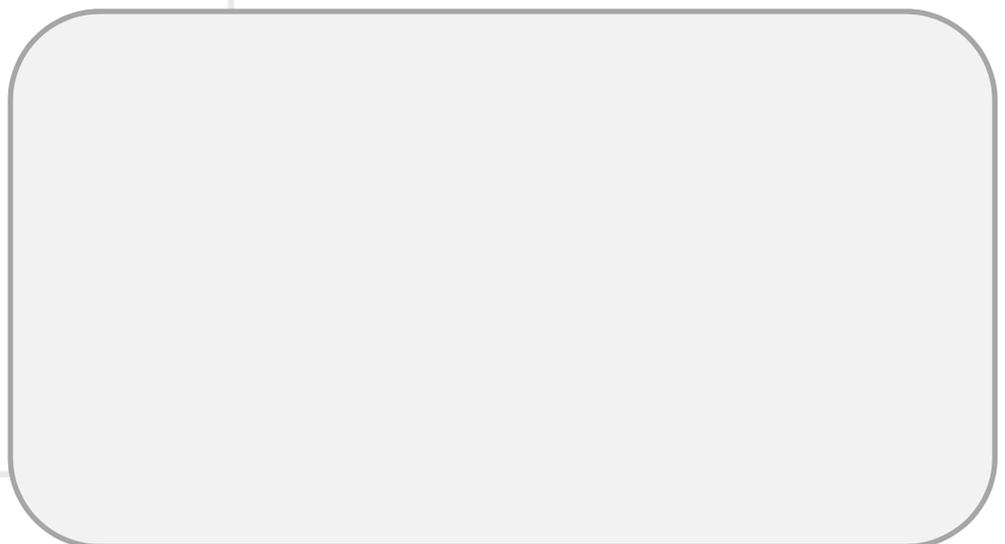
### Key solutions

- Skills and behaviors
  - Conversion and Closing by the numbers
  - Identify skills to develop
  - Capture behavioral choices



### Key solutions

- Leadership = Influence
  - Communication
  - Trust
  - Internal Advocates



# THE EDGE SERIES

## PRODUCER PRODUCTIVITY

– Gregg Goodmanson

### Key solutions

- Time management
  - Know Yourself
  - Take Control of Your Morning
  - Create Rituals

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### Notes

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**PRODUCTIVITY  
IN EXECUTION**



Drew Yancey

# THE EDGE SERIES

## PRODUCTIVITY IN EXECUTION

– *Drew Yancey*

**What are OKRs?**

**In what ways can you see the principles of OKRs helping you focus on execution and implementation in your position?**

**Why is speed such a critical successful factor today?**



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DISCOVER A NEW LEVEL OF DEVELOPMENT.

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PROGRAM PRESENTED BY  
LARRY LINNE, GREGG GOODMANSON AND DREW YANCEY

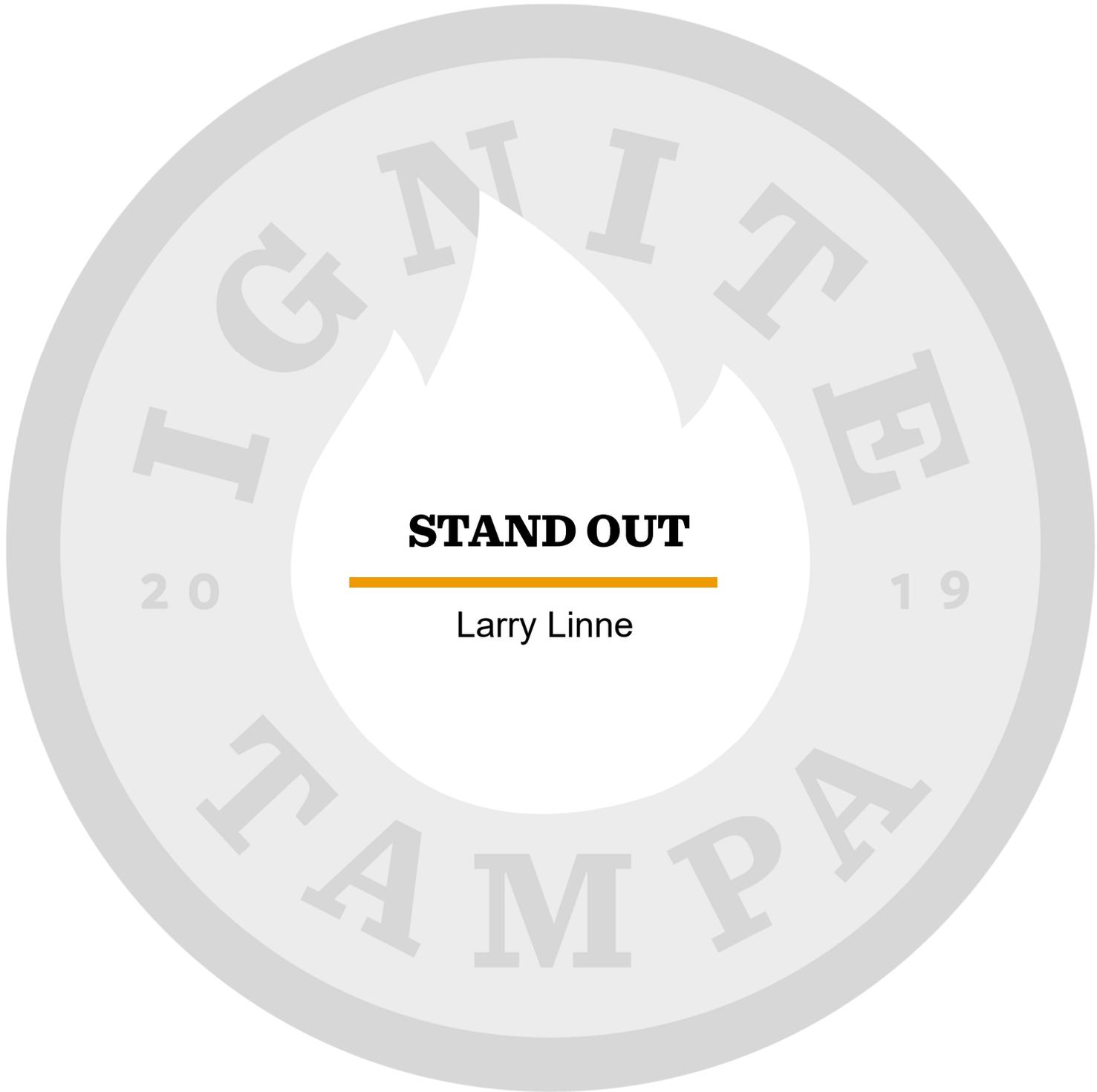
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# **Morning Workshops**

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The EDGE Series – Sales



**STAND OUT**



Larry Linne

# THE EDGE SERIES

## **STAND OUT**

– *Larry Linne*

**The impact of packaging on the sale (psychological)**



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**Where and how to influence the sale in a plan**

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**How “selling the process vs using the process”  
makes a difference**

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**THE SCIENCE  
OF NEGOTIATION**

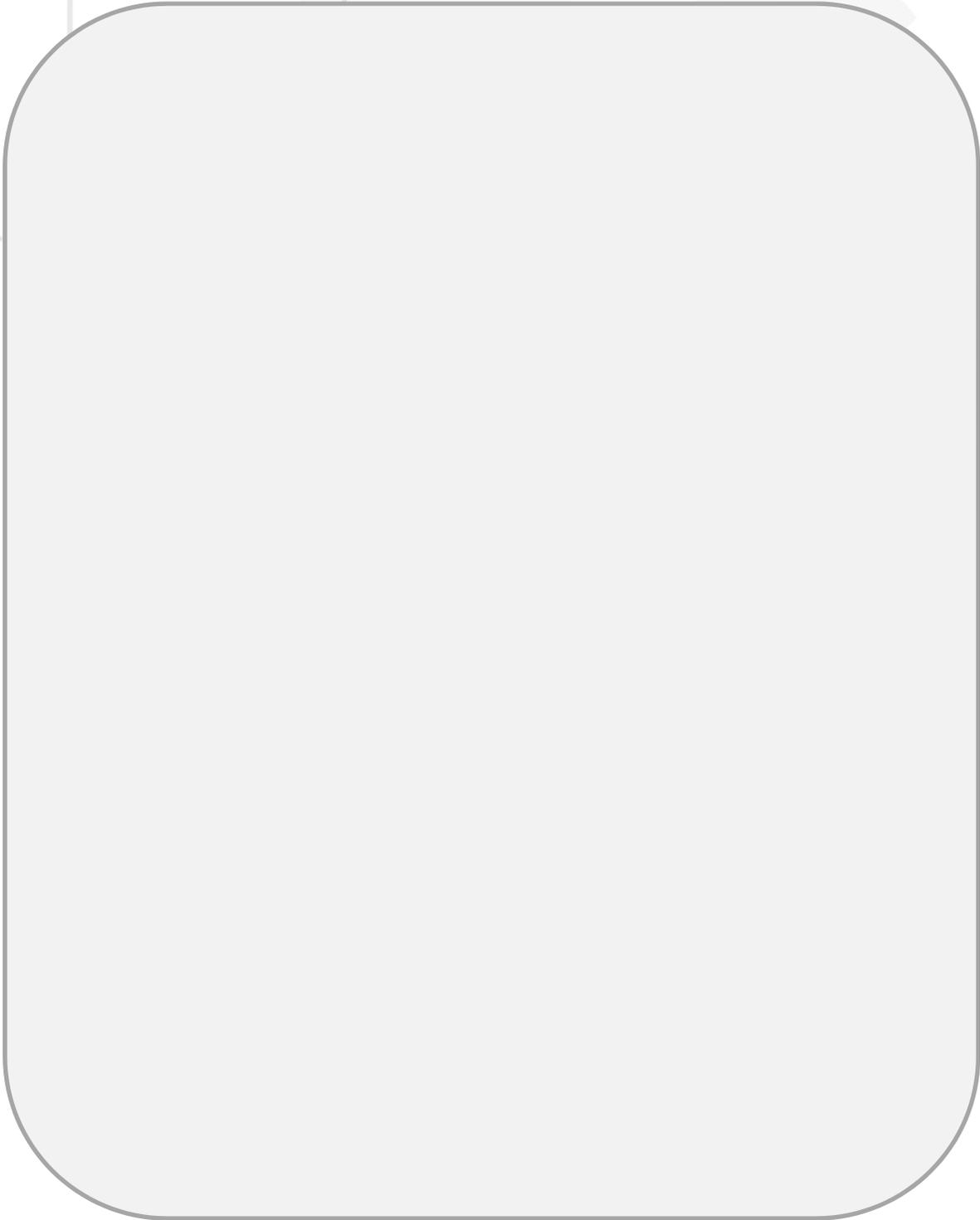
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Brandon White

# THE EDGE SERIES

## THE SCIENCE OF NEGOTIATION

– *Brandon White*





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**CONVERSION  
SUCCESSES**

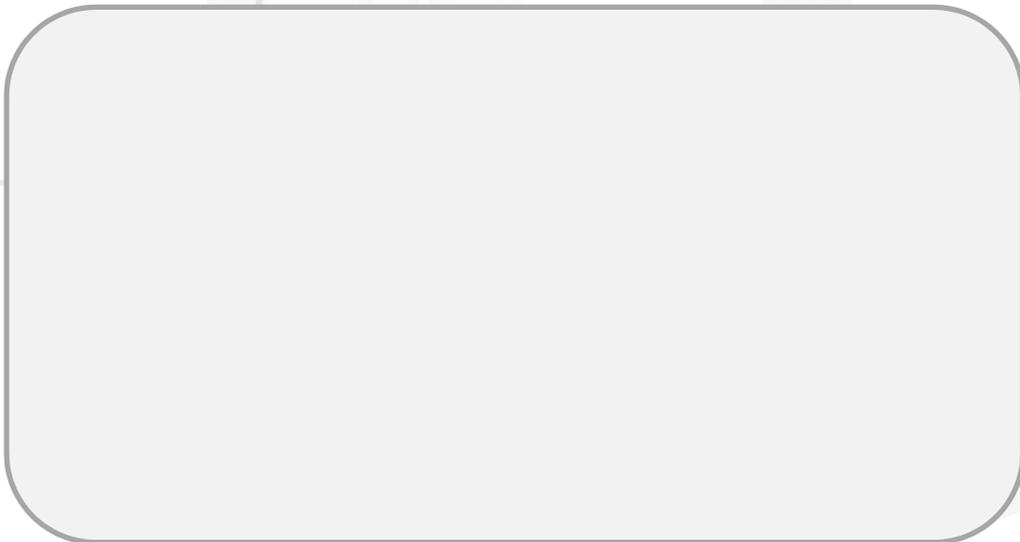
Gregg Goodmanson

# THE EDGE SERIES

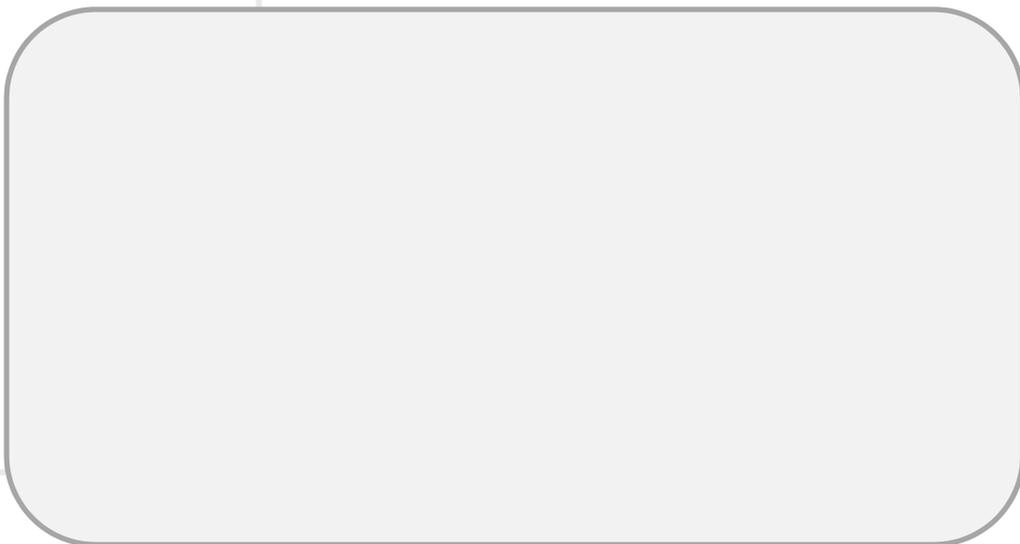
## CONVERSION SUCCESSES

– Gregg Goodmanson

### Conversion – WHY



### What the video series can do

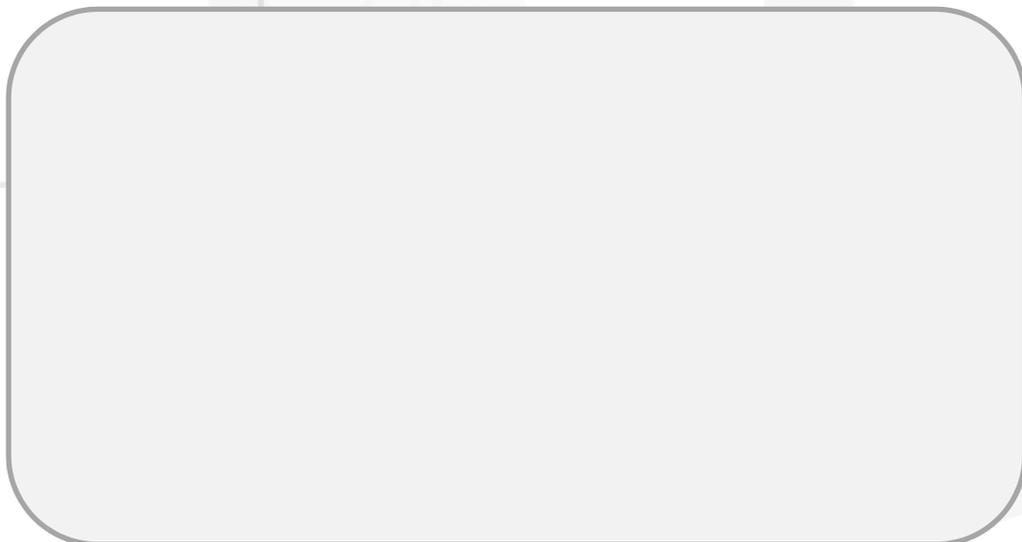


# THE EDGE SERIES

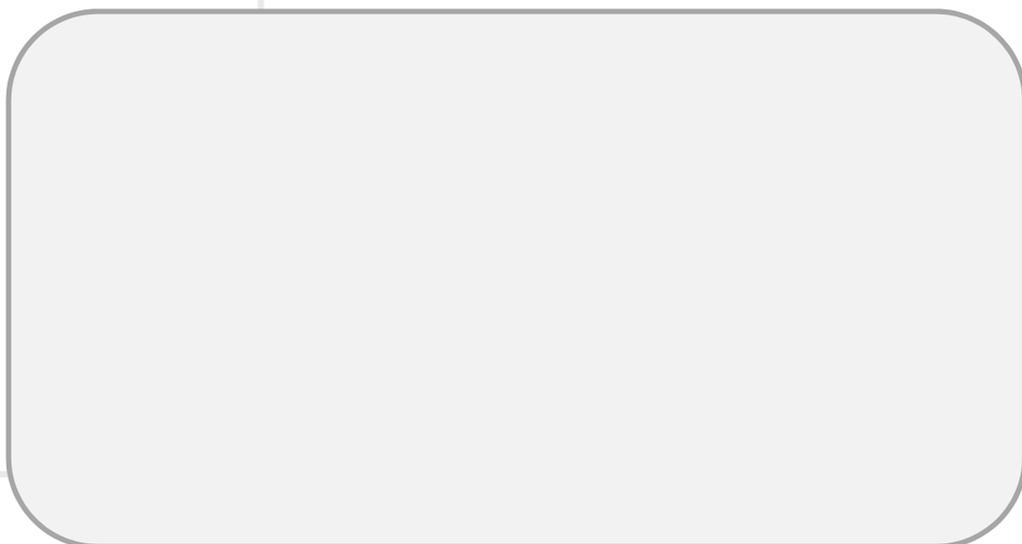
## CONVERSION SUCCESSES

– Gregg Goodmanson

**How to leverage the series and conversion overall**



**How others are leveraging the conversion series**



# SALES MASTERY 17

SEPTEMBER 19-20, 2019 | LOUISVILLE, KY



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# **Afternoon Workshops**

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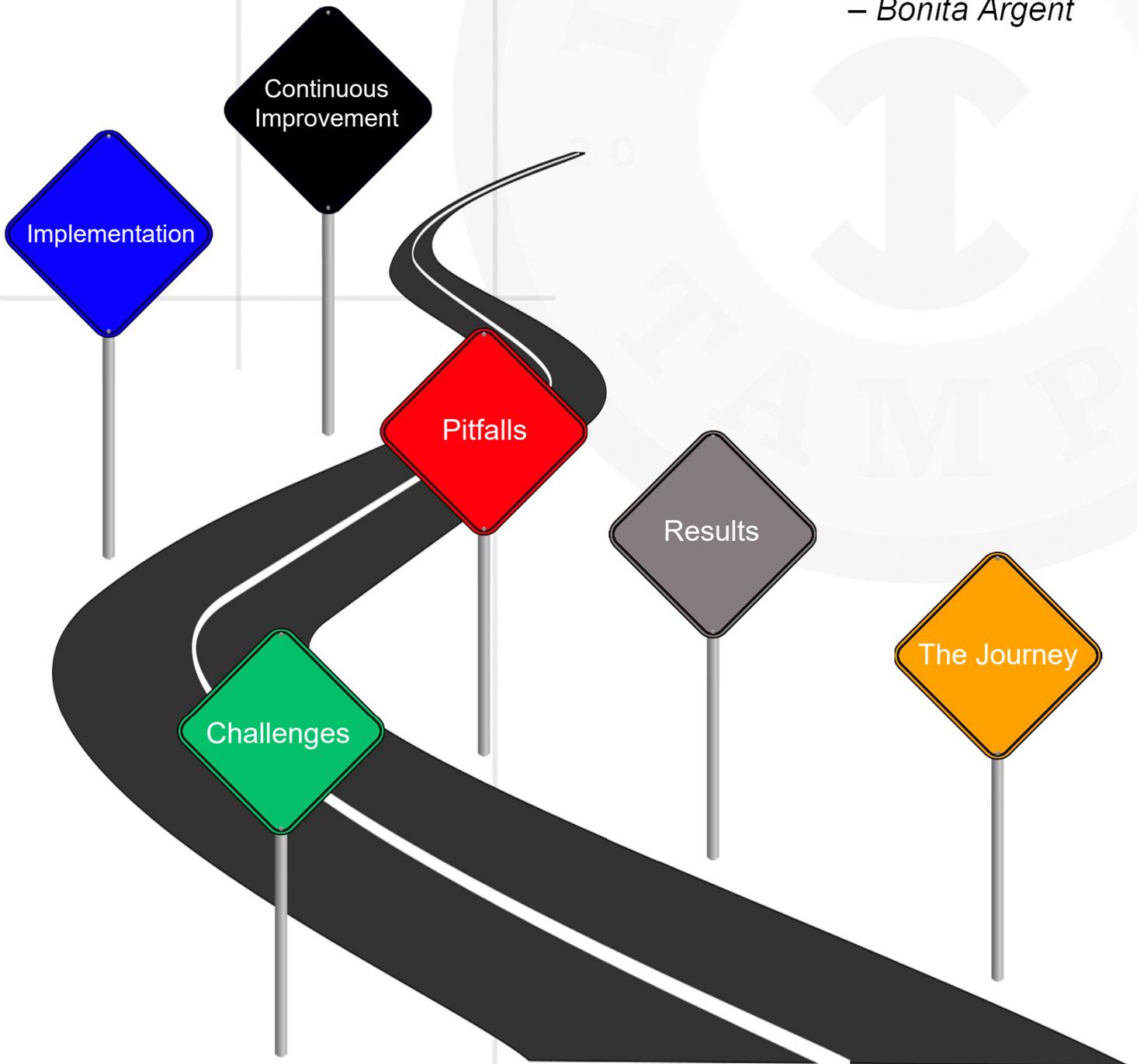
The EDGE Series – Financial



# THE EDGE SERIES

## OPERATIONAL PROFIT

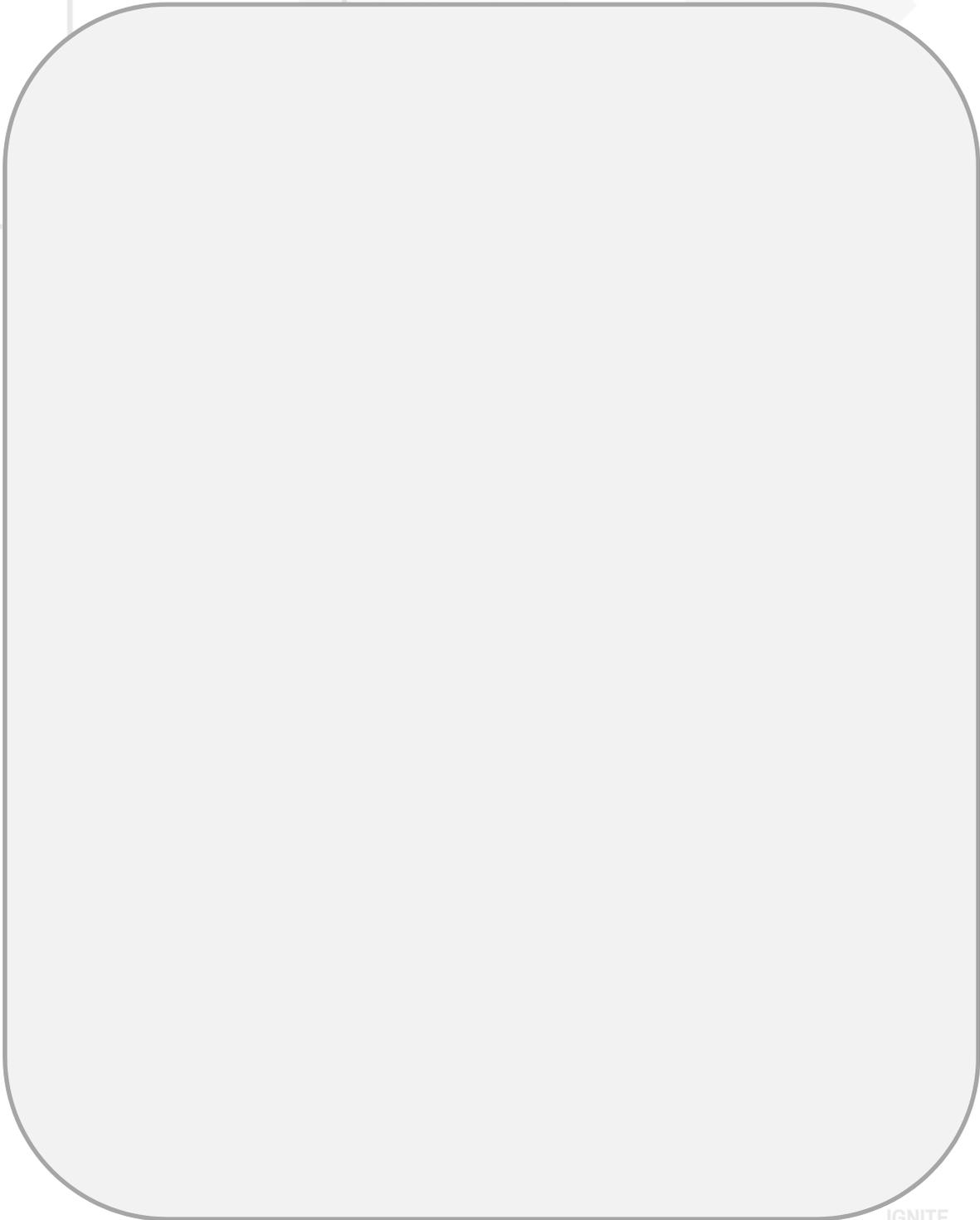
– *Bonita Argent*



# THE EDGE SERIES

## OPERATIONAL PROFIT

– *Bonita Argent*





**YOU HAVE OPTIONS**

Larry Linne

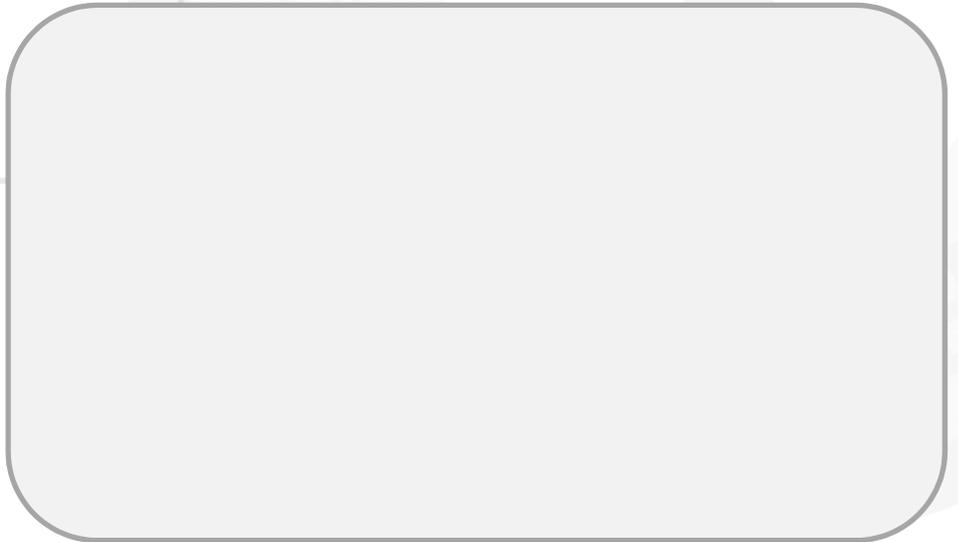
# THE EDGE SERIES

## YOU HAVE OPTIONS

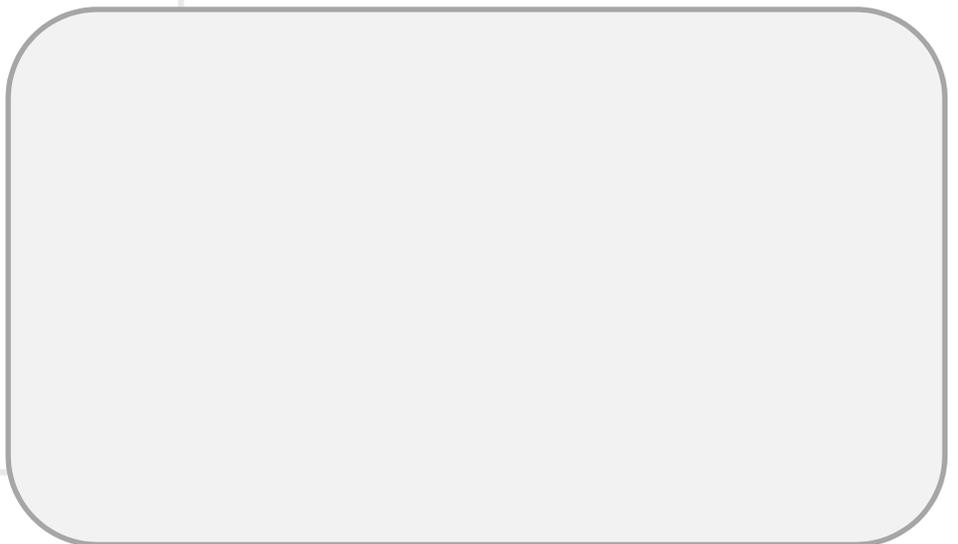
– *Larry Linne*

### The universe of perpetuation

- A. Financial
- B. Business Continuity
- C. Cultural (Leadership)



### Clarity of why growth matters

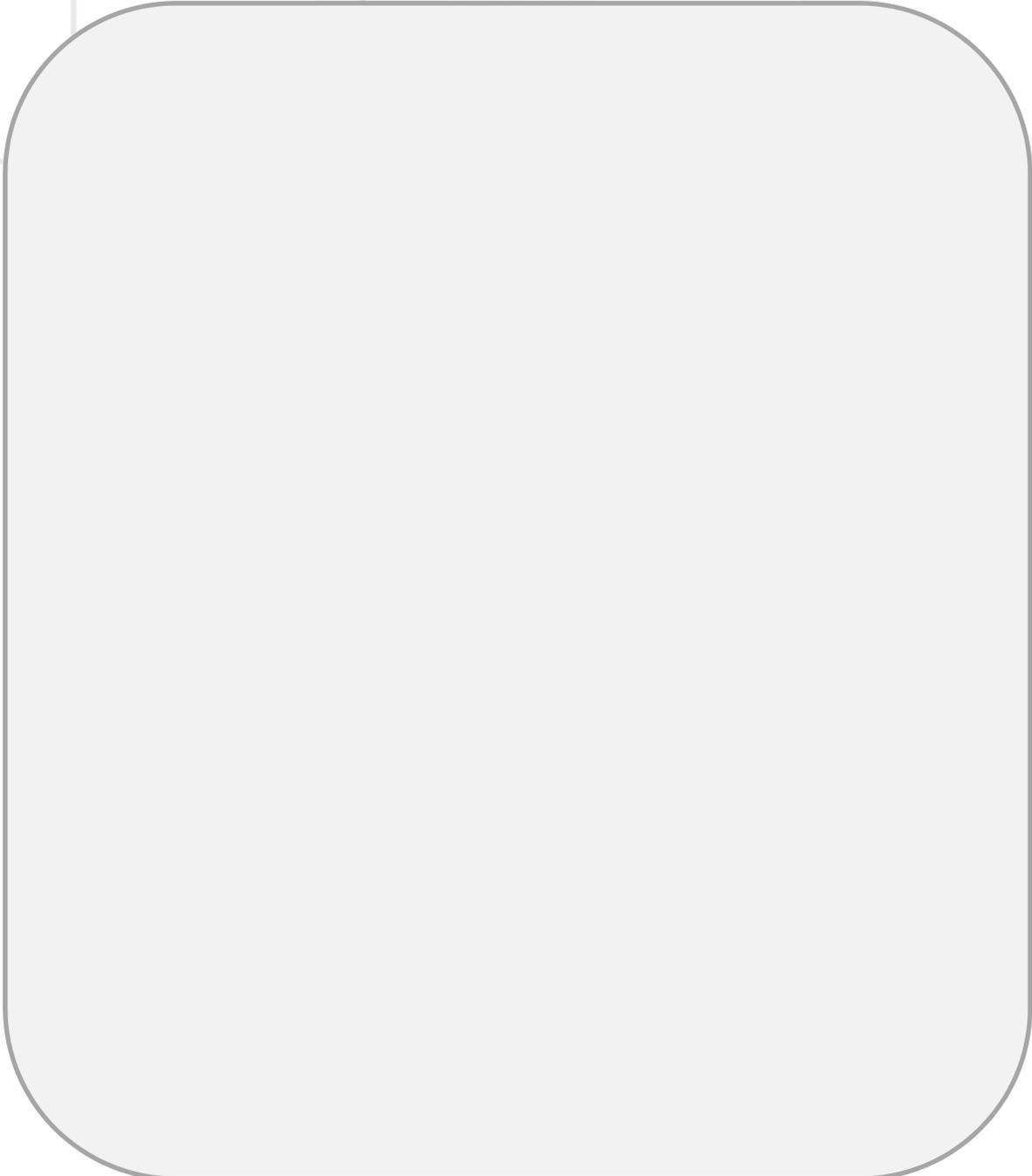


# THE EDGE SERIES

## YOU HAVE OPTIONS

– *Larry Linne*

### Why I wrote my resignation letter





**FINANCIAL  
LEADERSHIP**

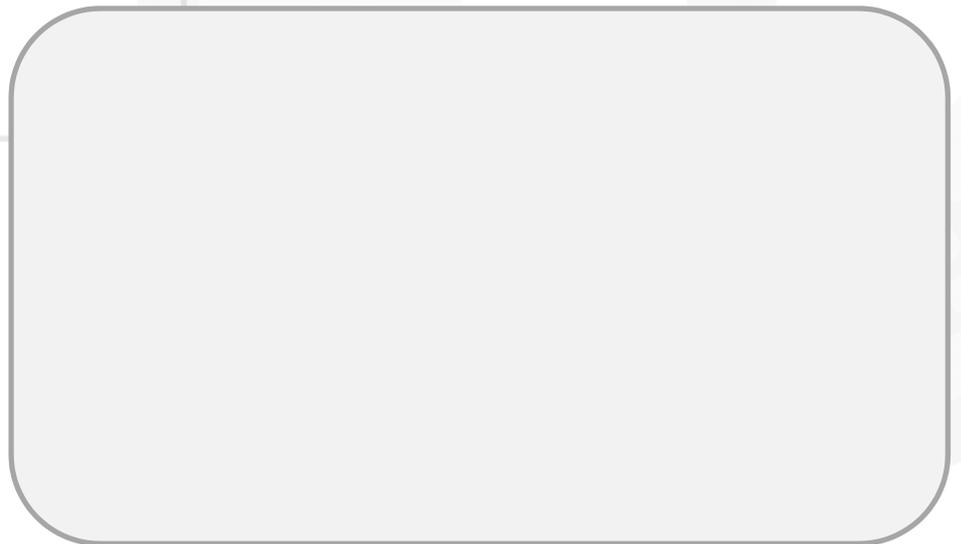
Drew Yancey

# THE EDGE SERIES

## FINANCIAL LEADERSHIP

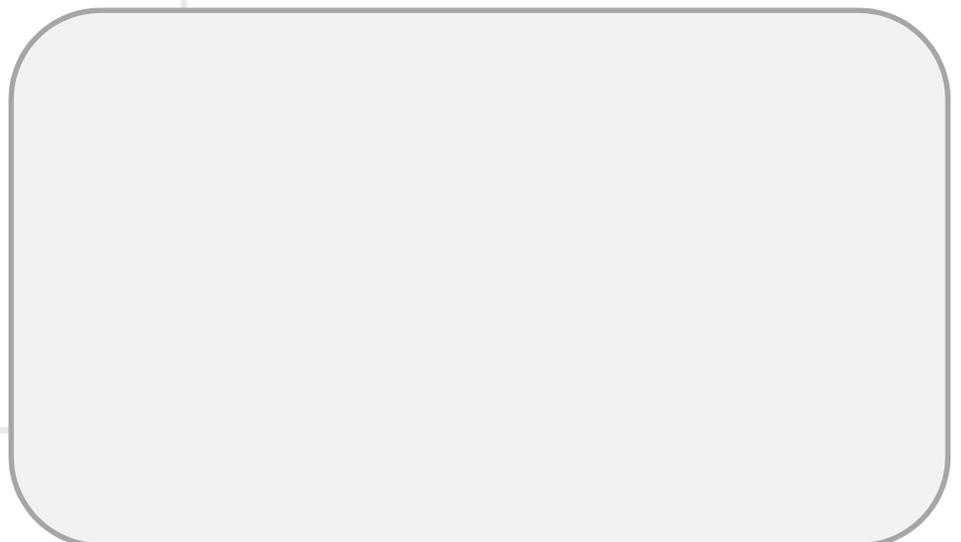
– *Drew Yancey*

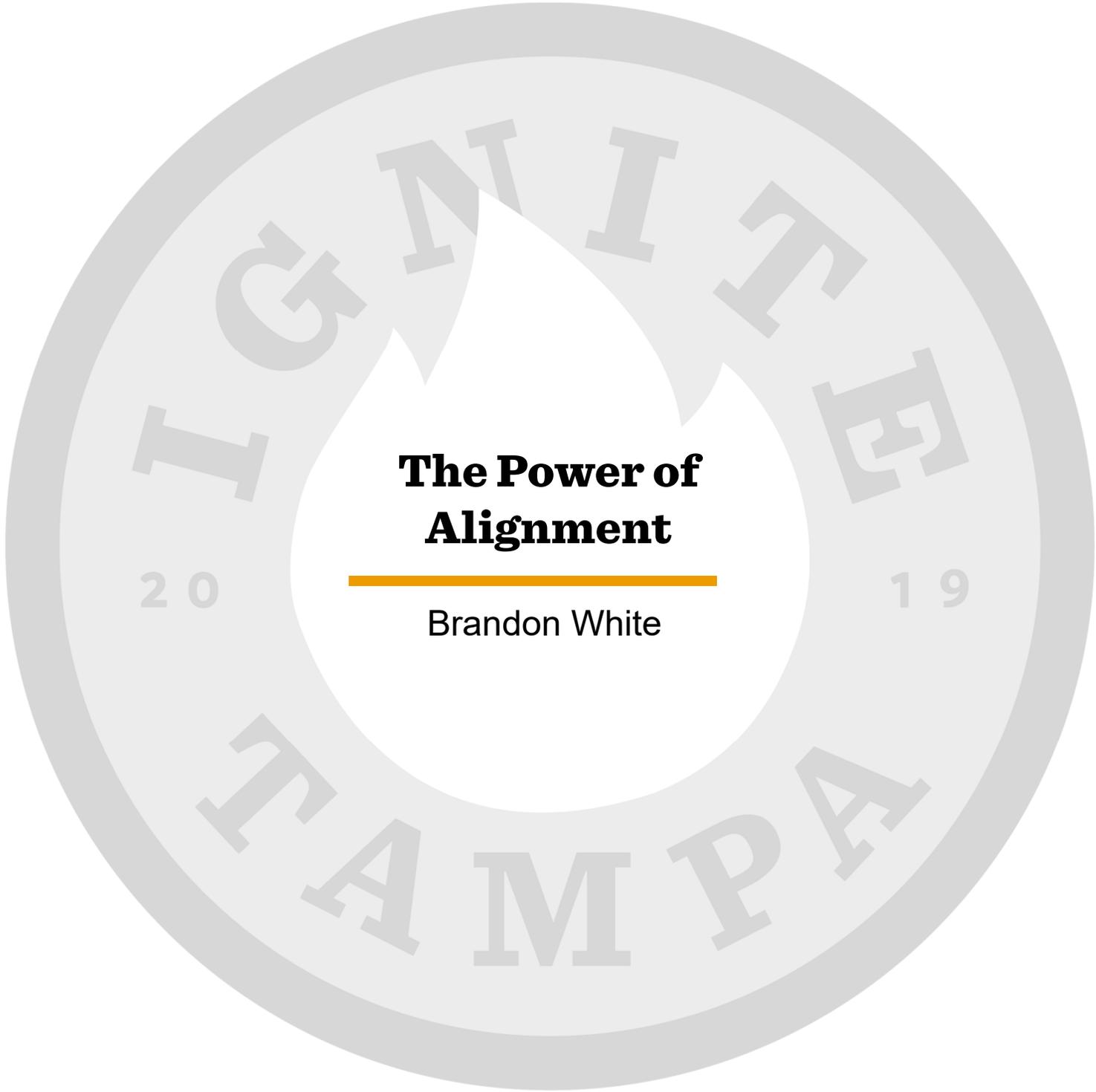
**How are you being challenged to think differently about financial leadership?**



**As a result of what you have heard, what can you commit to:**

- A. Start Doing?
- B. Stop Doing?
- C. Keep Doing?



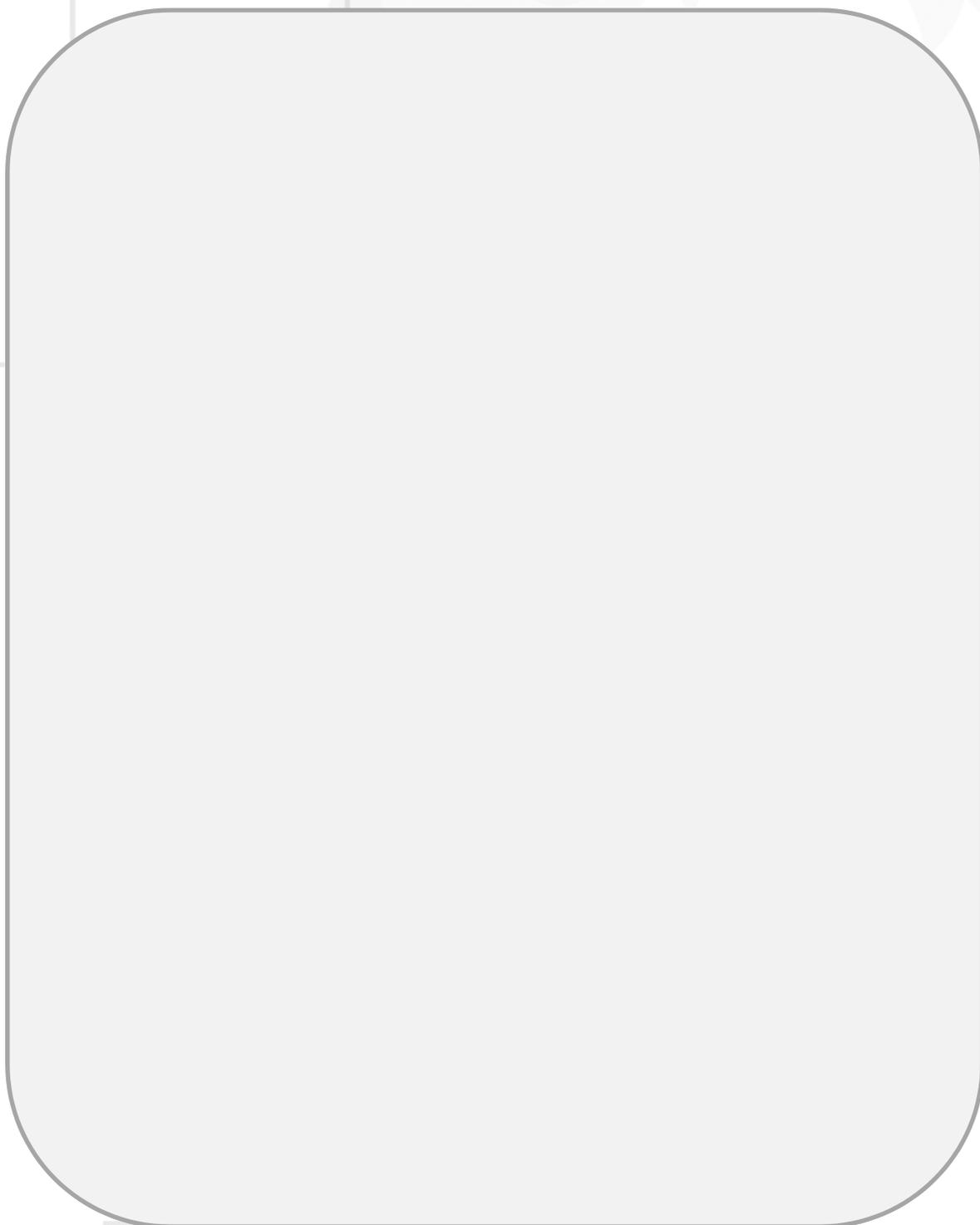


**The Power of  
Alignment**

Brandon White

# The Power of Alignment

– *Brandon White*



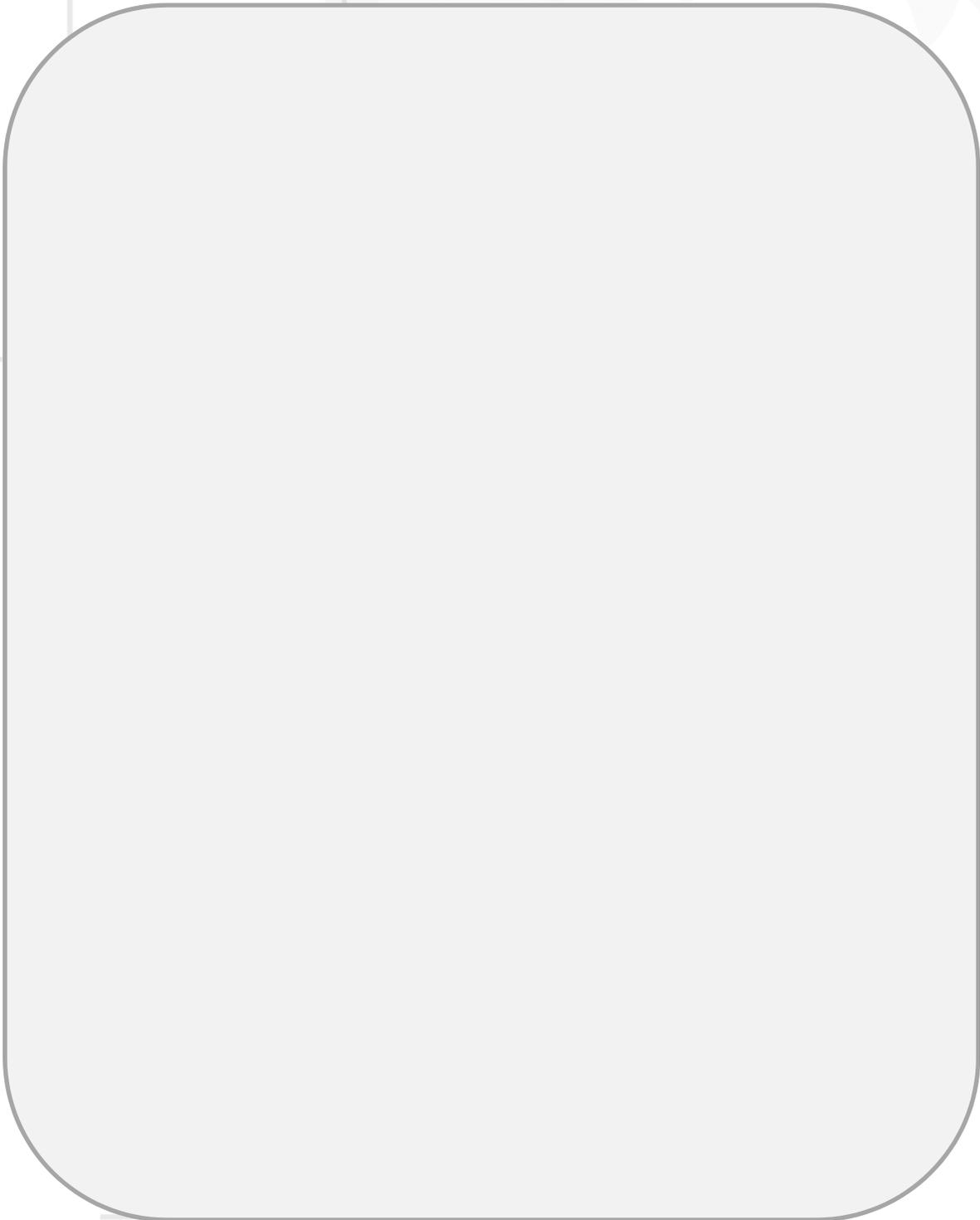


**How to Help Your  
Clients Get The EDGE**

Maura Derstein

# How to Help Your Clients Get The **EDGE**

– Maura Derstein



● APRIL 20-22 ●

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# IGNITE 2020

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JW Marriott | Chicago, IL  
More Details Coming Soon.



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