



PRINCIPALS
• A C A D E M Y •

INDEPENDENT INSURANCE AGENTS OF GEORGIA

Comprehensive training and development for your agency's current and future leadership.

IIAG's Principals Academy offers a comprehensive training and development program suited for future insurance agency principals and anyone on your agency management team focused on being the most effective agency principal they can be. The program is presented by industry experts and leaders over the course of three, two-day sessions and covers:

- **Performance Measures:** What do they mean and how does your agency compare to others?
- **Industry Trends:** What is the direction of the independent agency system?
- **Recruiting:** How to find, hire, retain, and lead the best talent in the industry.
- **Operations:** Utilize workflow and technology to run an efficient and profitable agency that serves your clients well.
- **Business Planning:** Chart your agency's course for where you want to go and how you are going to get there.
- **Valuation & Perpetuation:** Learn to enhance the value of your agency to allow you options for passing it onto the next generation.
- **Legal and Human Resources:** What you need to know about compliance in today's regulatory environment.
- **Leadership:** How to lead effectively in today's climate through clarity and vision.



Independent Insurance Agents of Georgia, Inc.
4555 Mansell Road, Suite 300 . Alpharetta, GA 30022
770-458-0093 . www.iiag.org



INDEPENDENT INSURANCE AGENTS OF GEORGIA

Academy Instructors

- Brian McKneely, Partner Reagan Consulting, IIABA Best Practices
- Harrison Brooks, Consultant, Reagan Consulting, IIABA Best Practices
- Legends Panelist: Clay Snellings, CPCU, Principal, Snellings Walters Insurance Agency
- Legends Panelist, Bill Holman, CPCU
- Legends Panelist: Clint Ivy, President, Fleming & Riles
- Laura Nettles, Nettles Consulting Network
- Walt Brown, Entrepreneurial Operating Systems Implementer
- Dave W. Tralka, President and CEO, InsurBanc
- Mark Burnette, IIAG Counsel, Joyner & Burnette
- Stuart Ganis, CEO Ganis Consulting

Academy Dates

- November 1-2, 2017
- January 24-25, 2018
- April 25-26, 2018

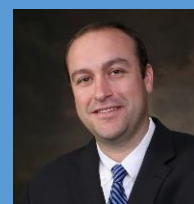
Academy Requirements

- Commitment to attend all three sessions
- Reading of one book ahead of each session which you are free to purchase in whatever format you prefer.
- Completion of an agency data collection report. The agency specific Best Practices agency analysis report will be yours to keep. (A \$500 value)
- Non-disclosure agreement.
- Completed on-line application.
- Written essay on why you want to participate in the Principals Academy and what you hope to achieve.

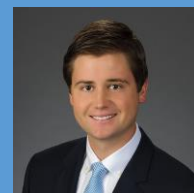
Academy Enrollment Fee

The Principals Academy enrollment fee is \$750 per student and includes lunch every day. Seating is limited to 15 so please apply today!

Registration Register online at www.iiag.org, or call Elaina Lonidier, IIAG Association and Events Coordinator at 770-458-0093 ext. 107, email:elonidier@iiag.org



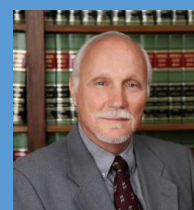
Brian McKneely



Harrison Brooks



Laura Nettles



Mark Burnette



Walt Brown



Dave Tralka



Stuart Ganis

Session One
November 1-2, 2017
Southern Insurance Underwriters
4500 Mansell Road, Alpharetta, GA 30022



Session One , Day 1

Wednesday November 1, 2017

9:00 a.m. -12:00 p.m.

Best Practices Study of your agency with Reagan Consulting
with Brian McNeely and Harrison Brooks

- An agency specific Best Practices analysis of your agency (a \$500 value).
- Review of contents of several Best Practices studies and what they mean.
- Breakout sessions discussing agency specific performance ratios.
- State of the Industry review and discussion of what that means to your agency.
- Producer Recruiting & Development
- Leadership

12:00 p.m.

Lunch provided on site

12:30 p.m. - 5:00 p.m.

Best Practices Study continues

Session One, Day 2

9:00 a.m. - 11:00 a.m.

Legends Panel Discussion with Clay Snellings, CPCU, Bill Holman, CPCU, and Clint Ivy, AAI, CIC

11:00 a.m. - 2:00 p.m.

Best Practices Study continues with working lunch at 12:00 p.m.

NEARBY HOTELS

Holiday Inn Express: 2950 Mansell Rd, Alpharetta, GA 30022 [Phone: \(770\) 552-0006](tel:(770)552-0006)

Country Inn & Suites: 3000 Mansell Rd, Alpharetta, GA 30022 [Phone: \(770\) 645-6060](tel:(770)645-6060)

Ramada Limited: 3020 Mansell Rd, Alpharetta, GA 30022 [Phone: \(678\) 461-7300](tel:(678)461-7300)

Session Two

January 24-25, 2018

**LOCATION: Risk Innovations- 211 Perimeter Center Pkwy
Suite 1050, Atlanta, GA 30346**



PRINCIPALS
• A C A D E M Y •

- **WHAT TO BRING:** Your agency's assessment from Reagan Consulting reviewed in the last session and one or two questions you have from it. For example, "Why is my agency's revenue per employee low?"

Session Two, Day One

Wednesday, January 24, 2018

Agency Operations

with Laura Nettles, Nettles Consulting Network

9:00 a.m. - 2:00 p.m.

- Workflow
- Policies and procedures

12:00 p.m. Lunch provided on site

12:30 p.m. – 5:00 p.m.

- Accounting
- Account current
- Account receivables management

Session Two, Day II

Thursday, January 25, 2018

9:00 a.m. - 2:30 p.m.

12:00 p.m. Lunch Provided on Site

Stuart Ganis - Ganis Consulting

[Stuart Ganis](#) started his career as a producer in 1989 and later co-founded an independent insurance agency with his wife [Mary](#), that grew to 20 million in premium volume within 3.5 years. After the sale of the agency, Ganis launched a consulting firm serving local insurance agents in the areas of sales, marketing, operations and M&A advisory services with emphasis on seller representation. Over 1,000 Owners have attended our Agency Growth Academy which challenges Agency Principals to review every facet of their business including sales and service processes, marketing strategy, retention and cross-sell best practices, tracking metrics, culture, and most importantly, themselves.

NEARBY HOTELS

Embassy Suites: 1030 Crown Pointe Pkwy, Dunwoody, GA 30338 Phone: 770-394-5454

Hyatt Place Perimeter Center: 1005 Crestline Pkwy, Sandy Springs, GA 30328, Phone: 770-730-9300

Crown Plaza Atlanta Perimeter: 4355 Ashford Dunwoody Rd, NE Dunwoody, GA 30346, Phone: 678-695-9060

Comfort Suites Perimeter Center: 6110 Peachtree Dunwoody Rd, Sandy Springs, GA 30328, Phone: 770-828-0330

Hampton Inn & Suites Atlanta Perimeter: 4565 Ashford Dunwoody Road, Atlanta, GA 30346, Phone: 855-605-0317

Session Three

April 25-26, 2018

9:00 a.m. - 5:00 p.m. and 9:00 a.m. - 3:00 p.m.

LOCATION: Genesee General, 3025 Windward Plaza, Suite 400,
Alpharetta, GA 30005



PRINCIPALS
• A C A D E M Y •

Session Three, Day I

April 25, 2018

A.P.E. Methodology with Walt Brown

Align, Plan and Execute (A.P.E) with EOS Implementer Walt Brown for more time, more money and less stress.

<http://www.waltbrown.info/4.html>

The **First key APE factor**, *Alignment*. - What we mean by Alignment is Personal and Professional Alignment, the Alignment of your Personal Visions with your Business Visions. We need to be aligned to be our best. Click the Alignment Tab to see how.

The **Second key APE factor** is *Planning* - What we mean by planning is the logical Recording and Writing Down of Strategic Thinking. Many of us are blessed (or you could say cursed) with a natural ability to think Strategically about the future. The issue is, we often do not capture our thoughts well and we certainly do not write it down. If a plan is not written down it cannot be followed. "No plan is a plan to fail. If you do not know where you are going, you just might get there." You know all the cliches. Click the Planning Tab to see the program we use.

The **Third key APE factor** is *Execution* - Every organization needs to have ONE system they use to Execute their plans. Those that have settled on one system (about 20%) are the Great Companies, the other 80% who flog around between systems are Good or Average. I help companies choose one. I specifically teach one that I know works. Click the Execution Tab to see how.

Session Three, Day Two

April 26, 2018

9:00 a.m. - 3:00 p.m.

Agency Perpetuation and Valuation

with Dave Tralka, InsurBanc

9:00 a.m. - 11:30 a.m.

Mergers & Acquisitions

- Purchase financing and payment plans
- Attracting new owners
- Stock options and ownership plans for producers.
- Multiples of EBITA or Revenues

11:30 a.m. Lunch

12:00 p.m. - 3:00 p.m.

Agency Legal Matters

with IIAG Counsel Mark Burnette



PRINCIPALS
• A C A D E M Y •

- Restrictive covenants and non-competes
- Vicarious liability of an employer for actions of an employee
- Federal Trade Commission Act and National Labor Relations Act and how they affect insurance agencies
- E-verify and how it applies to hiring and filing requirements
- Overview of “at will” employment under Georgia law
- Shareholder and operating agreements

NEARBY HOTELS

Hilton Garden Inn: 4025 Windward Plaza, Alpharetta, GA 30005, Phone: 770- 360-7766

Atlanta Marriott Alpharetta: 5750 Windward Pkwy, Alpharetta, GA 30005 Phone: 754-9600