



The ICG Client Roadmap



Getting Started

Getting Started with a Certified Ivy Consultant

Asking for help takes guts. Just by taking that step, you're already way ahead of the game. And by hiring a certified *Ivy Consulting Group* consultant or simply using a partner in the *ICG Network*, you've joined the thousands of business owners and corporate executives who realized that having the right consultant is a huge asset to you as a business leader.

Whether the biggest challenge you face today is stabilizing cash flow, getting your people on board or generating new business, our clients have used this process to get out of the overwhelm and move closer to the business, and the life, they wanted.

The secret to why the *Ivy Consulting Group* network works isn't because of us, it's because of you. It's because you're willing to see how the business is a reflection of you - and how you're being held back by some choices you made, or didn't make, along the way. You now have access to the most powerful tools and systems in the industry to make some changes and have confidence in the results.

We call our curriculum the ICG Business Development System. The whole system is broken up into 10 Dynamics with hundreds of certified Industrial-Organizational professionals worldwide. We cover every aspect of your business from front to back including Market Research, Diversity, Equity, and Inclusion, Assessments & Selection, Motivation & Engagement, Wellness, Training & Coaching, Team Building, Performance Management, Leadership Development, Strategic Planning, and much more. Each process is designed to solve a distinct problem or create a specific system to help you grow. And when you are ready to implement your new strategy, regardless of whether you have a team of 5 or 5,000, our certified consultants will be ready to go.

From the first call your certified consultant will help you maximize every available system and prioritize what steps to take next. Working together to build your custom Road-map, we will help you understand where your business is today and structure the best way to help you create the business you have always wanted.

Below you'll see the growing list of Ivy Consulting processes defined by the Lesson Plans in which each system resides. And of course, these Lesson Plans are only part of the process. The magic of coaching comes alive in the relationship you have with your consultant, having a trusted advisor who guides you along the way and challenges you to step up to a new kind of business leadership, to grow your business, and enrich your life.

From all of us here at Ivy Consulting Group, best wishes on your journey.

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Branding

- Building Your Brand
- Advertising Your Brand
- The Ultimate Customer Experience
- Differentiating Your Agency
- So What Makes the Elite Agents So Unique?

Client Retention

- Driving Customer Retention
- Know Your Customer
- Why Customers Leave
- Service after the Sale
- Under Promise and Over Deliver

Finance

- Finance 101 The Basics
- Understanding Business Finance
- Budgeting For Success
- Following the Right Financial Path
- Tax Planning Strategies for the Insurance Agent
- Too Much Month and Not Enough Money

Leadership and Self-Awareness

- Discovering Your Passion
- Stay True to Your Dream
- Installing Ethics and Expecting Integrity
- Inventing Your Leadership Style
- Taking Responsibility for Your Success
- Self-Organization
- Time Management Systems that Work
- Your Agency Story
- What's Important Now

Life Balance

- Balance is the Key to Long-Term Success
- The Power to Control Your Own Destiny
- Your Bucket List and Having Time

Marketing and Sales

- Built to Impress Sales
- Exploring Social Media
- Life Sales Made Easy
- Understanding Your Competition
- Call Reluctance and Agency Fears
- Developing Your Financial Sales System
- Exploring Your Marketing Strategy
- Your Market Centers of Influence
- Setting Your Sights on Commercial
- Stop Cold Calling and Get 3 Referrals with Every Sale
- Stop Quoting and Start Building Relationships
- Trade Shows and Event Marketing
- Understanding Your Competition

Staff Development

- Awaken Your High Performance Team
- Hire the Right People
- Invest in Quality People
- Setting Expectations and Employee Accountability
- Developing Compensation Programs that Motivate
- Educating Your Staff Manager
- Effective Staff Appraisals
- Powerful Staff Meetings and Brainstorming Sessions
- Getting Your Experienced Staff Reengaged
- Resolving Conflict and Frustrations
- Setting Expectations and Employee Accountability
- Your Staff as Your Raving Fans

Strategic Planning

- 100 Steps to a Successful Insurance Agency
- Turning Your Business Plan into an Action Plan
- Creating a Self-Running Agency
- The Four Levels of Small Business
- Why Most Agents Plateau
- Using Org Charts to Turn Your Dream into a Reality

Systems Development

- Office Manuals and Procedure Guides
- Agency Sales Systems
- Your Interview System
- Creating Meaningful Systems
- Technology and the Modern Insurance Agent
- Trust But Verify—Your Quality Control System
- Your Recruiting System

