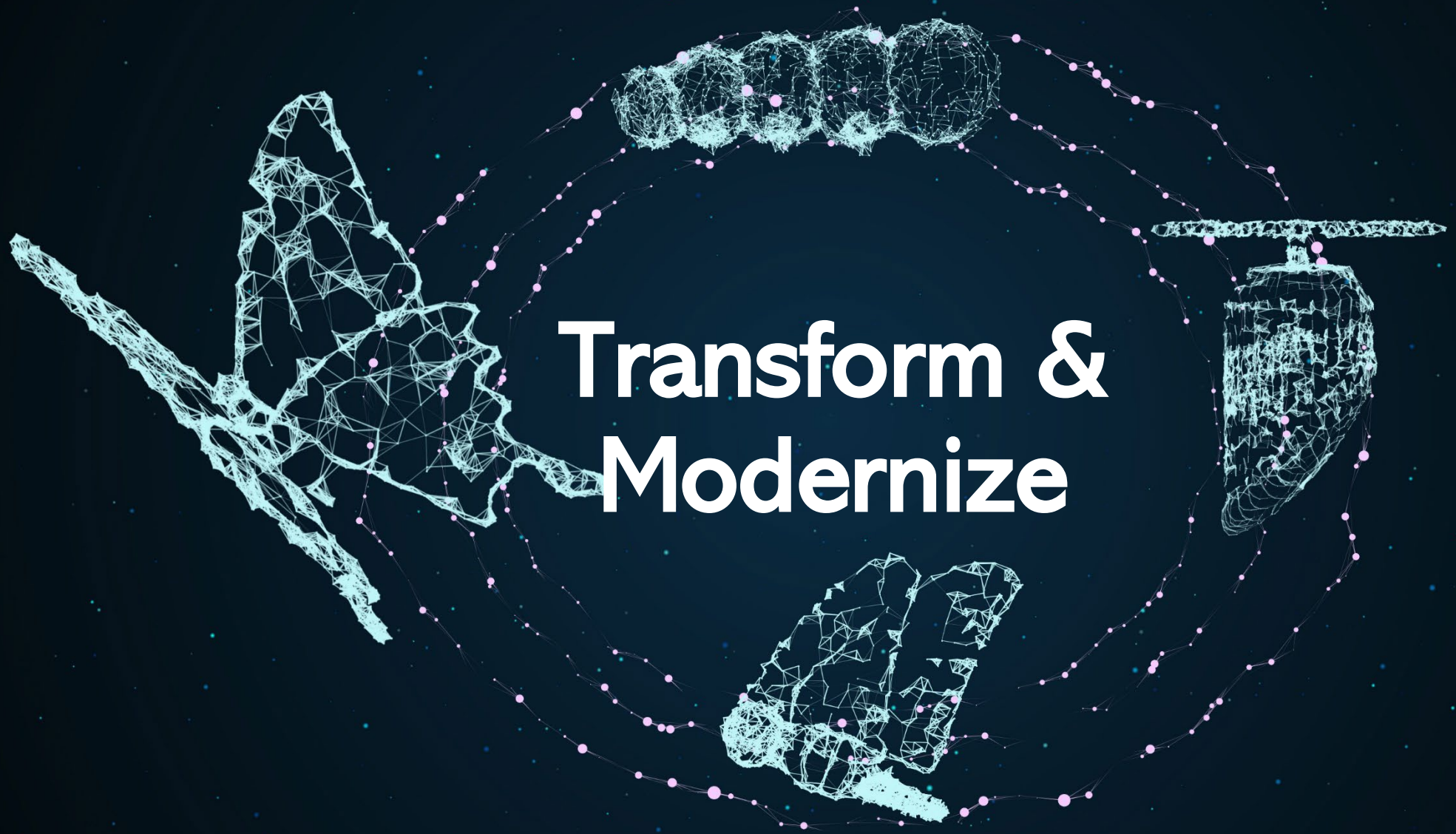
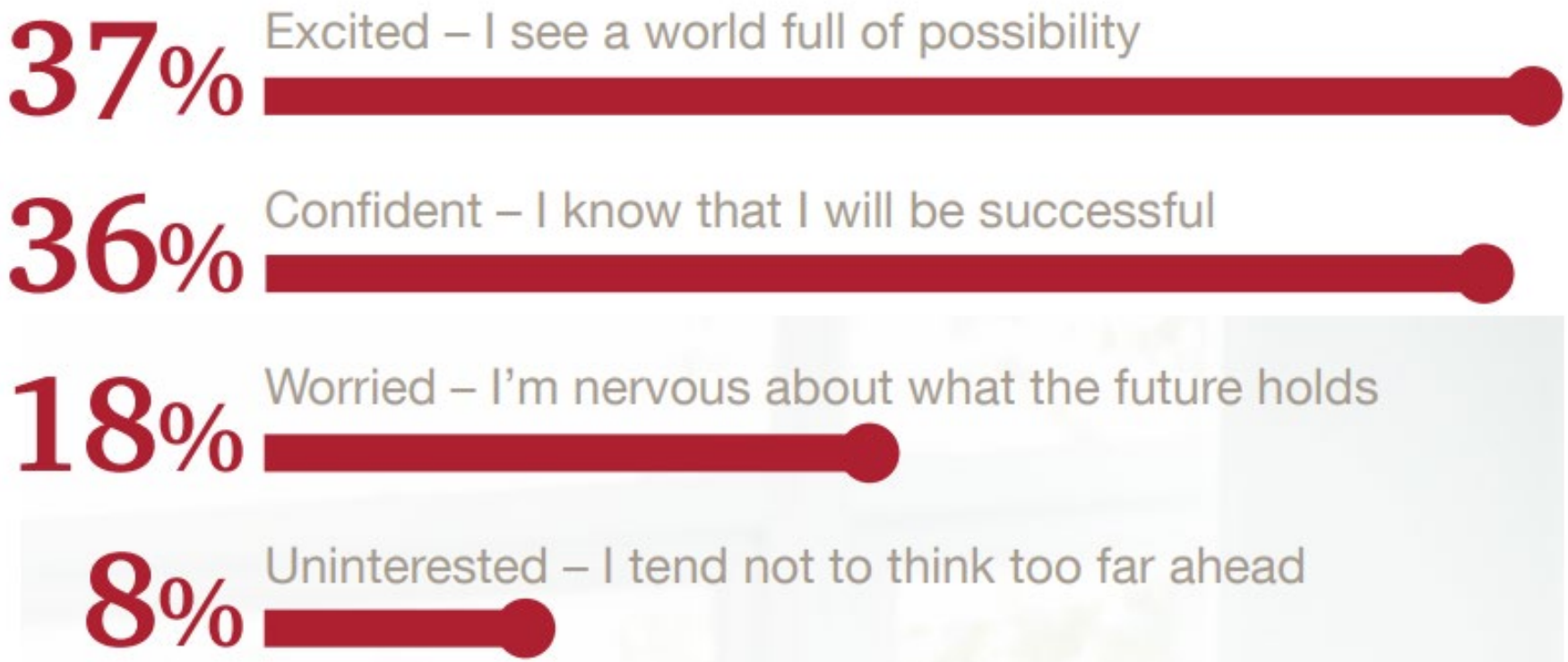

Transform &
Modernize

Figure 1: When you think about the future world of work as it is likely to affect you, how do you feel?



PwC survey of 10,029 members of the general population based in China, Germany, India, the UK and the US – base all those who are not retired 8,459

Forces Shaping the Future

- the **economic shifts** that are redistributing power, wealth, competition and opportunity around the globe;
- the **disruptive innovations**, radical thinking,
- **new business models** and
- **resource scarcity**

are impacting every sector

The Road To The Future is Being Mapped Out Today

“We should remember that intellectual complacency is not our friend and that learning - not just new things but new ways of thinking - is a life-long endeavour.”

- Global Leader, Strategy and Leadership Development, PwC

an organization can only become the best-version of itself to the extent...

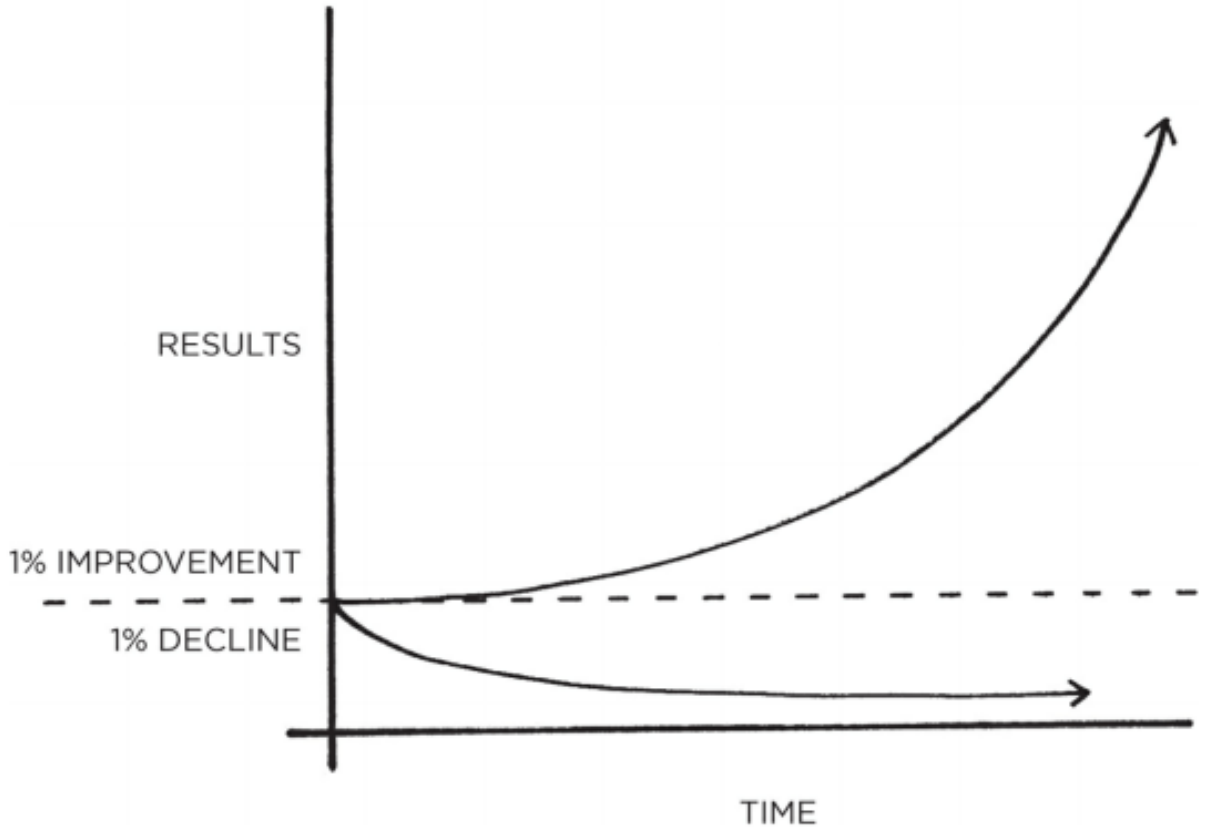
You are the average of the five people you spend the most time with.

- Jim Rohn

1% BETTER EVERY DAY

1% worse every day for one year. $0.99^{365} = 00.03$

1% better every day for one year. $1.01^{365} = 37.78$



time to be
more human than human

15% of our financial success is technical ability

85% of our financial success is due to our people skills

Transform

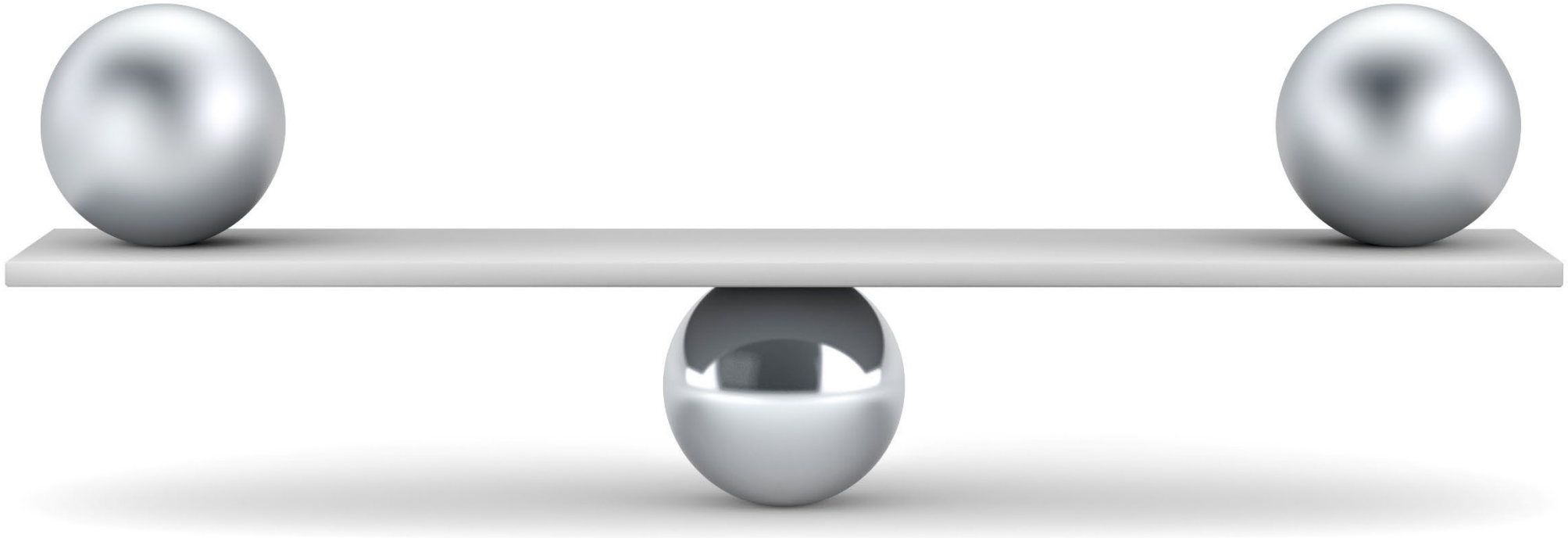
the experience

- the mindset
- the culture
- the team

Modernize

the tools

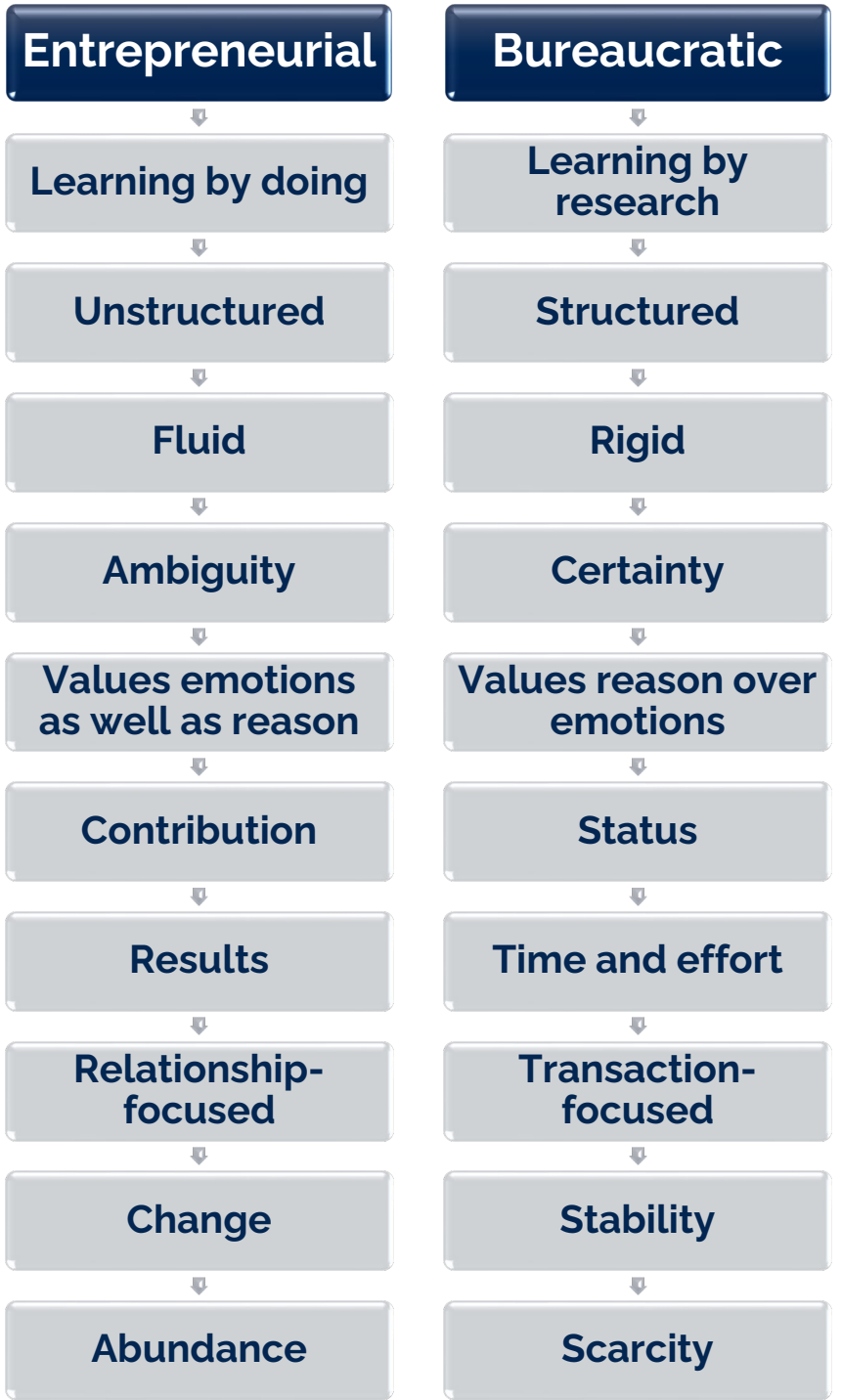
- the data management
- the technology
- the delivery system
- the communication



for individuals, character is destiny

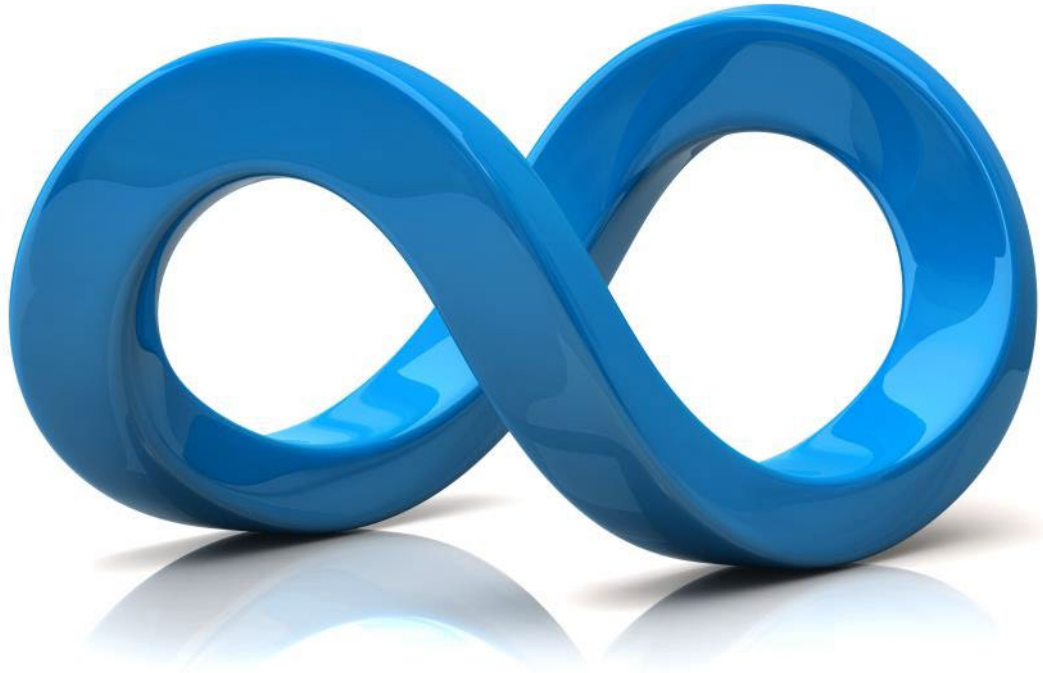
for companies, **culture** is destiny

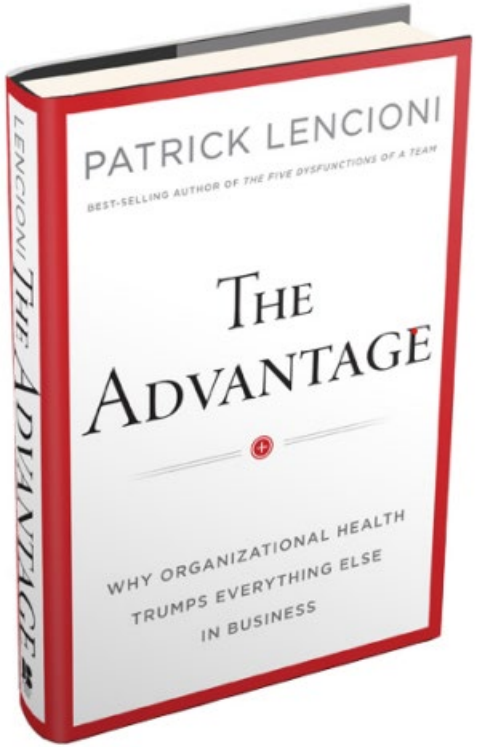
Organizational Culture



A Continuous Improvement Culture

- The vision is clearly communicated.
- All employees are committed to continuous improvement.
- Standards, accountability and expectations are clearly stated.
- Change is constant.
- A ‘teaming’ environment exists.
- Constant learning is the norm.





tablegroup

Organizational Health Survey

www.tablegroup.com/organizational-health-survey/

Take this quick organizational health survey based on Patrick Lencioni's best-selling book, *The Advantage: Why Organizational Health Trumps Everything Else in Business*, and get a snapshot of your organization's overall health, as well as advice on how to start addressing this critical question.

MW+C

Momentum for stalled, stuck, and stale industries.

www.mckeewallwork.com/#stalledstuckstale

STALLED? STUCK? STALE?

60-SECOND SELF-DIAGNOSIS

MW+C

Momentum for stalled, stuck, and stale industries.

www.mckeewallwork.com/#stalledstuckstale

60-SECOND SELF-DIAGNOSIS

Most organizations are stalled, stuck or stale at some point in their existence. This simple, 20-question assessment (based on research conducted among hundreds of stalled companies) can give you a sense of what may be slowing your momentum.

1. We tend to over-think things *

○ Strongly Agree ○ Somewhat Agree ○ Neutral ○ Somewhat Disagree
○ Strongly Disagree

2. We are funding our marketing plan sufficiently *

○ Strongly Agree ○ Somewhat Agree ○ Neutral ○ Somewhat Disagree
○ Strongly Disagree

3. We're achieving our marketing objectives *

Customized Results Report

LACK OF ALIGNMENT

Unhealthy Healthy

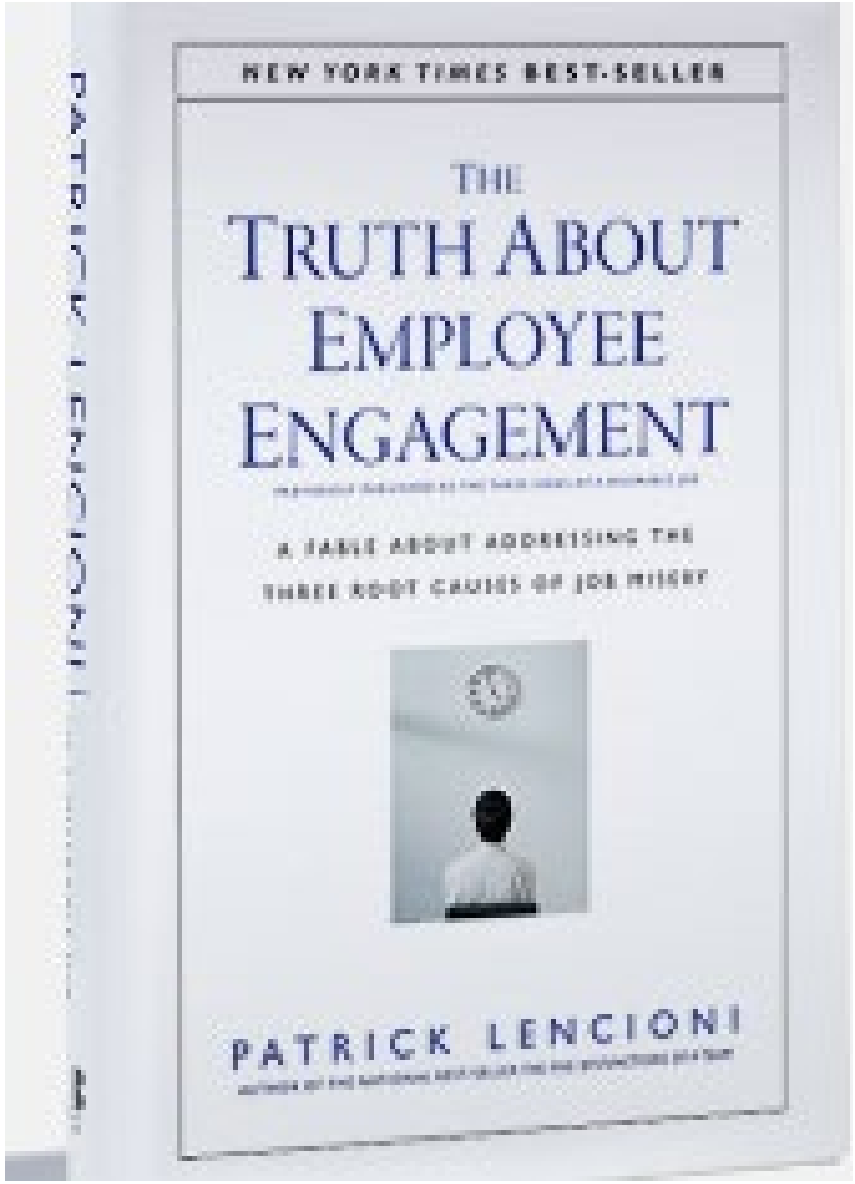
LOSS OF FOCUS

Unhealthy Healthy

LOSS OF NERVE

Unhealthy Healthy

INCONSISTENCY



The person who has by far the greatest impact on an employee is the employee's manager.

Managers are handling the most baffling material on Earth: people

-The Economist

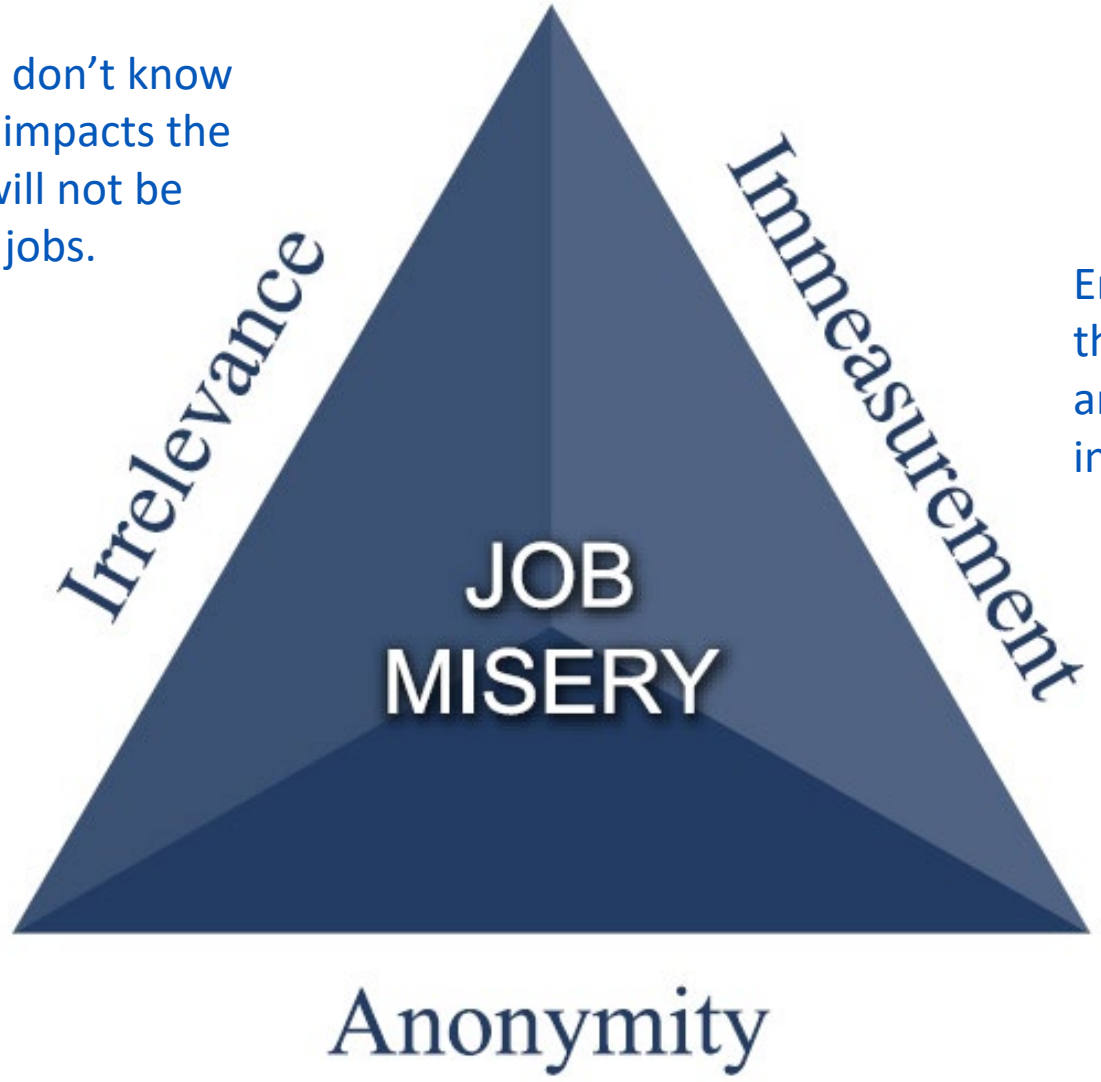
Managers report higher stress and burnout than those they manage.

Reflection

- **Ask yourself:**
  - How much do you know about your people, and how often do you engage them around their lives?
  - Have you ever talked to them about the importance of their work in the context of other people's lives?
  - Have you worked with them to establish a clear, meaningful way to measure their success?
- **Managing is not merely a job or a title; it's a vocation and a ministry.**

The Three Signs of a Miserable Job

Employees who don't know how their work impacts the lives of others will not be fulfilled in their jobs.



Employees who can't assess their own level of performance and success will not be fulfilled in their jobs.

Employees who aren't known and individually appreciated by their managers will not be fulfilled in their jobs.

Engagement

- **Measure**
  - Survey your employees using credible, comprehensive questions.
- **Have Growth-Oriented Conversations**
  - Bring your survey findings to life through genuine conversations.
- **Provide Clear, Ongoing Communication**
  - Managers must implement leadership decisions while motivating their team to get work done.
  - Provide clear expectations, the right resources and opportunities to do what each person does best.
- **Focus on Wellbeing**
  - Employees, managers and supervisors all need to feel they are continuously developing in their work and overall lives.
  - The five elements of wellbeing — career, social, financial, physical and community — to reduce the odds of burnout, stress, worry, anxiety and depression
- **Have Strengths-based Conversations**
  - You can help make managers' jobs easier by teaching them to have higher-quality conversations — ones that occur frequently and that focus on employees' strengths.

Engaged Employees:

- Are 2X as likely to be thriving in their lives
- Can see opportunities for growth & development
- Put in extra effort to create exceptional customer value
- Feel connected to the mission & purpose of the organization
- Have co-workers they collaborate with
- Are more resilient during hard times

Morale

A direct link between employee partnership and stakeholder value & customer satisfaction

"First, Break all the Rules"

A direct link between employee engagement and business unit performance

Trusted Choice® | Independent Insurance Agents of Texas

MEMBERSHIP MAKES YOU STRONGER

Summit: "How do we grow?

12) This last year, I have had opportunities at work to learn and grow.
11) In the last six months, someone at work has talked to me about my progress.

Camp 2: "Do I belong here?"

10) I have a confidante at work.
9) My associates (fellow employees) are committed to doing quality work.
8) The mission/purpose of my company makes me feel my job is important.
7) At work, my opinions seem to count.

Camp 1: "What do I give?"

6) There is someone at work who encourages my development.
5) My supervisor, or someone at work, seems to care about me as a person.
4) In the last seven days, I have received recognition or praise for doing good work.
3) At work, I have the opportunity to do what I do best every day.

Base Camp: "What do I get?"

2) I have the materials and equipment I need to do my work right.
1) I know what is expected of me at work

Trusted Choice
Independent Insurance Agents of Texas
MEMBERSHIP MAKES YOU STRONGER

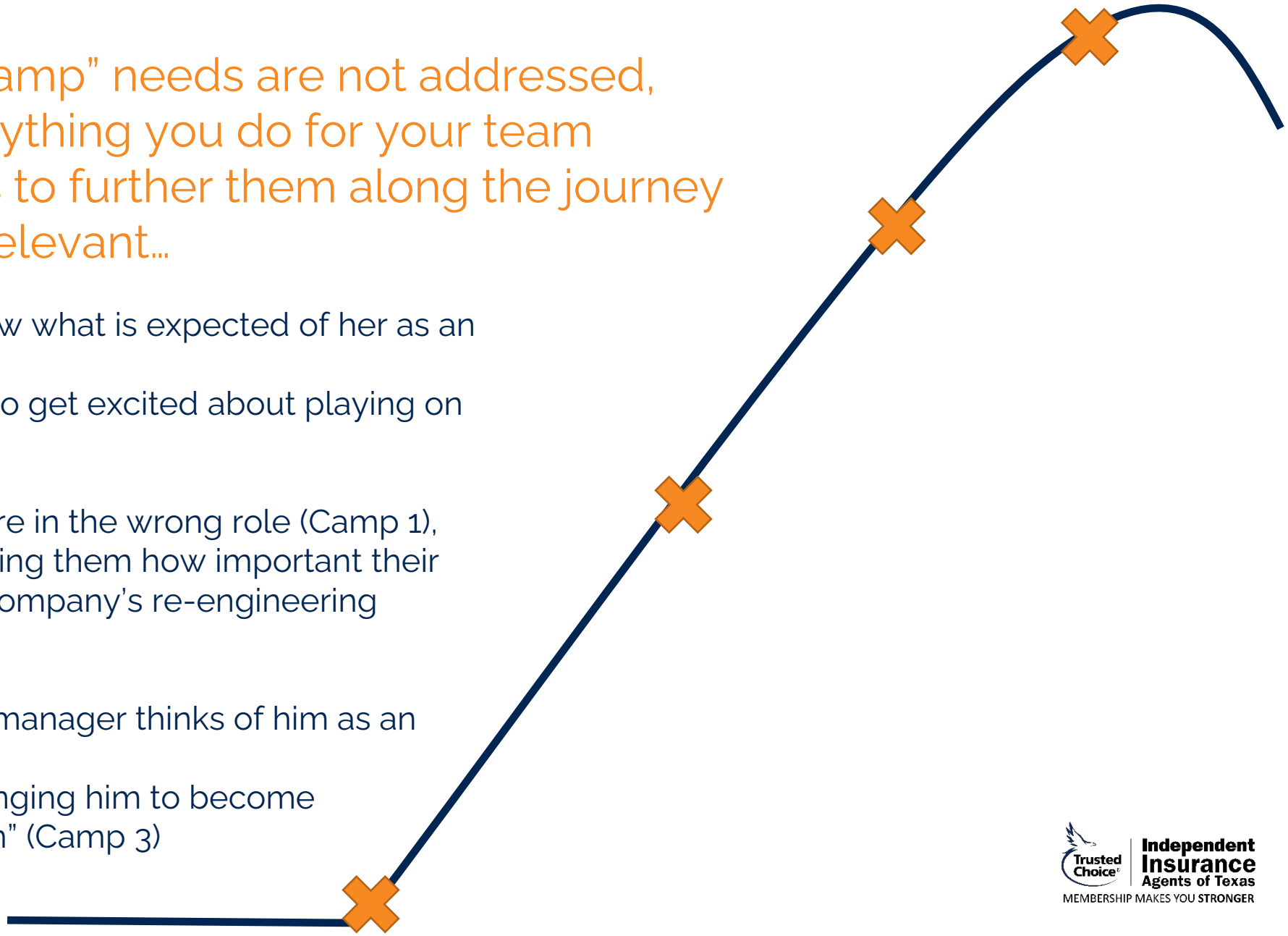
Mountain Climbing

If “base camp” needs are not addressed, then everything you do for your team members to further them along the journey will be irrelevant…

If the employee doesn’t know what is expected of her as an individual (Base Camp),
Then you shouldn’t ask her to get excited about playing on a team (Camp 2)

If they feel as though they are in the wrong role (Camp 1),
Don’t pander to them by telling them how important their innovative ideas are to the company’s re-engineering efforts (Camp 3)

If he doesn’t know what his manager thinks of him as an individual (Camp 1),
don’t confuse him by challenging him to become part of the “new organization” (Camp 3)



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Independent Insurance Agents of Texas
MEMBERSHIP MAKES YOU STRONGER

Strengths Interview

1) What keeps you here?
2) What do you think your strengths are? (skills, knowledge, talent)
3) **What tasks here are a poor use of your abilities?**
4) What are your goals for your current role? (Ask for scores and timelines)
5) How often would you like to meet with me to discuss your progress?
   Are you the kind of person who will tell me how you are feeling, or will I have to ask?
6) Do you have any personal goals or commitments you would like to tell me about?
7) What is the best praise you have ever received?
   What made it so good?
8) Have you had any really productive partnerships or mentors?
   Why do you think these relationships worked so well for you?
9) What are your future growth and career goals?
   Are there any particular skills you want to learn?
   Are there some specific challenges you want to experience?
   How can I help?
10) Is there anything else you want to talk about that might help us work well together?

Career Discovery Questions

- How would you describe success in your current role?
  Can you measure it?
- What do you do that makes you as good as you are?
  What does this tell you about your skills, knowledge and talents?
- Which part of your current role do you enjoy the most?
  Why?
- Which part of your current role are you struggling with?
  What does this tell you about your skills, knowledge and talents?
  What can we do to manage around this?
  Training? Positioning? Support system? Partnering?
- What would be the perfect role for you?
  Imagine you are in that role. It's 3pm on a Thursday. What are you doing?
  Why would you like it so much?

Engaged Employees:

- Are 2X as likely to be thriving in their lives
- Can see opportunities for growth & development
- Put in extra effort to create exceptional customer value
- Feel connected to the mission & purpose of the organization
- Have co-workers they collaborate with
- Are more resilient during hard times

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MEMBERSHIP MAKES YOU STRONGER

When selecting the right person…**select for talent**….
not simply experience, intelligence, or determination

TALENT: Naturally recurring patterns of thought, feeling, or behavior

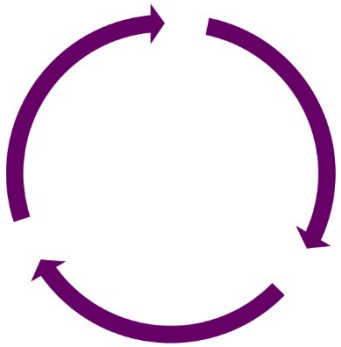
develop for strength

Every role has its own nobility.

Individual Strengths

Three Parts of the Mind

What can I be BEST in the world at?



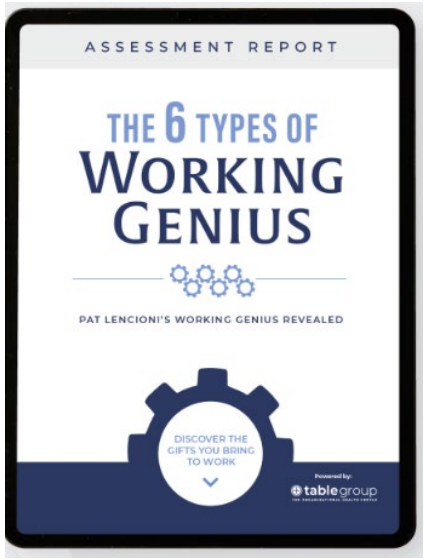
What am I most PASSIONATE about?

What am I ENERGIZED by?

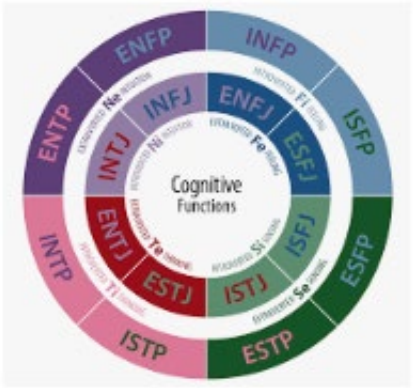
Talent Assessments

KOLBE CORP

Culture Index™
Making Executives Effective



CALIPER PERSONALITY PROFILE TESTS
ACCEPTED



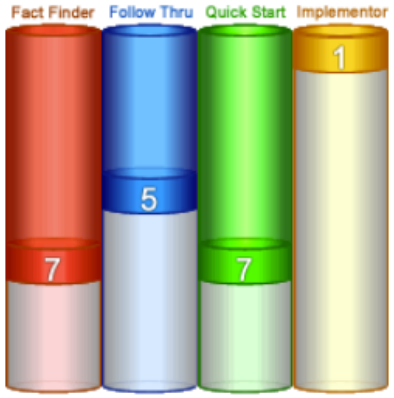
WHY® INSTITUTE

THE ENNEAGRAM INSTITUTE®

Insights

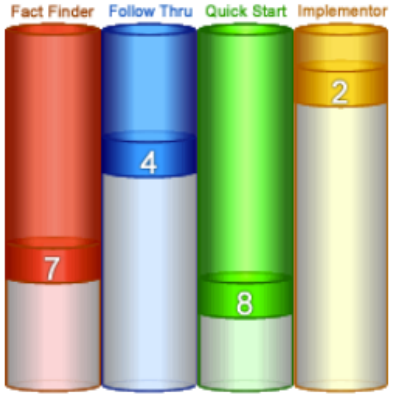
WHY®

Kolbe A™ Result



Action Modes® are behaviors driven by your striving instinct — not your personality or IQ.

Kolbe B™ Result



Conative Self-Expectations
(as of 01/06/2023)

Strategic | Relator | Maximizer | Individualization | Arranger

EXECUTING ⓘ | INFLUENCING ⓘ | RELATIONSHIP BUILDING ⓘ | STRATEGIC THINKING ⓘ

CliftonStrengths®

DONALD CLIFTON | 12-30-1999

Your CliftonStrengths 34 Results

You are uniquely powerful. Your distinct CliftonStrengths 34 profile sets you apart from everyone else. This is your talent DNA, shown in rank order based on your responses to the assessment.

Use this report to make the most of your strongest CliftonStrengths themes, navigate the rest and maximize your infinite potential:

- **Read and reflect on your results** to understand what you naturally do best.
- **Learn how to apply** your strongest CliftonStrengths every day.
- **Share your results with others** to create stronger relationships and improve teamwork.

STRENGTHEN

1. **Significance**
2. **Futuristic**
3. **Individualization**
4. **Focus**
5. **Maximizer**
6. Strategic
7. Learner
8. Achiever
9. Responsibility
10. Belief

NAVIGATE

11. Analytical
12. Competition
13. Activator
14. Self-Assurance
15. Discipline
16. Communication
17. Arranger
18. Intellection
19. Positivity
20. Ideation
21. Woo
22. Input
23. Deliberative
24. Developer
25. Relator
26. Connectedness

You lead with **Influencing** CliftonStrengths themes.

EXECUTING themes help you make things happen.

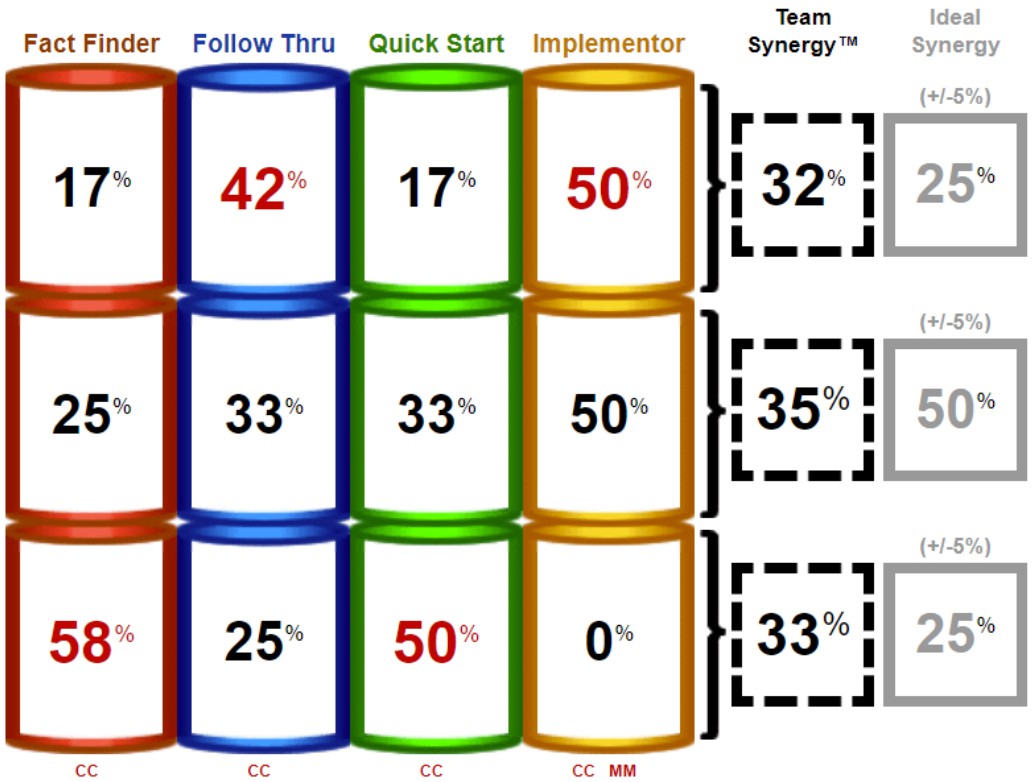
INFLUENCING themes help you take charge, speak up and make sure others are heard.

RELATIONSHIP BUILDING themes help you build strong relationships that hold a team together.

STRATEGIC THINKING themes help you absorb and analyze information that informs better decisions.

Team Strengths

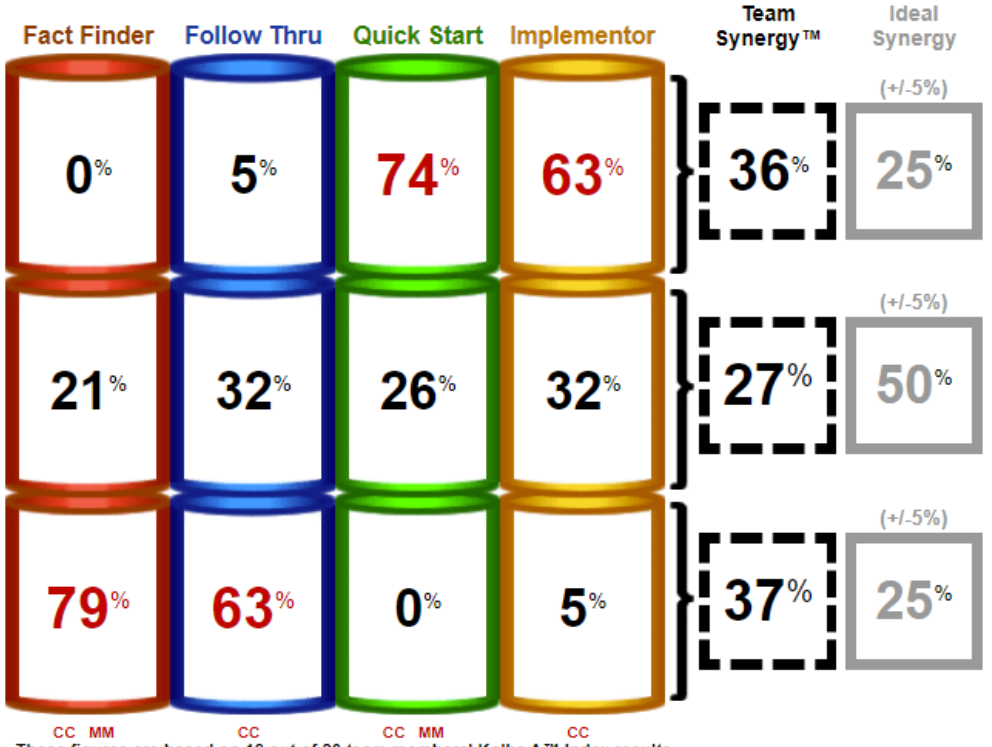
Kolbe A™ Distribution
Available Talent from your Kolbe A Results



These figures are based on 12 out of 12 team members' Kolbe A™ Index results.
If an Index is not completed or is in Transition it is not included.

CC = There is 1 or more instance of a HIGH degree of Conative Cloning in the specific mode.
MM = There is 1 or more instance of Missing Methods in the specific mode.

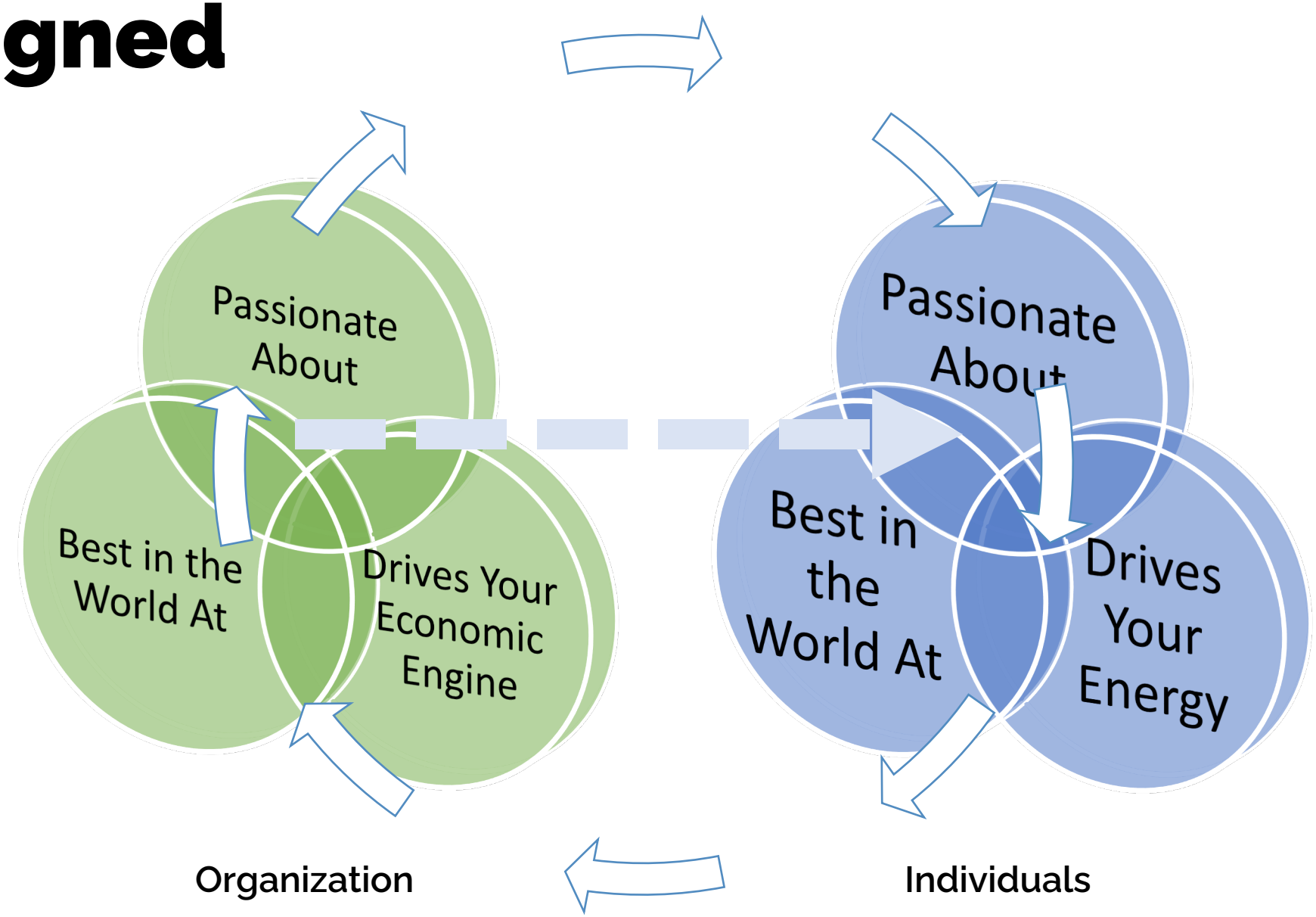
Kolbe A™ Distribution
Available Talent from your Kolbe A Results



These figures are based on 19 out of 20 team members' Kolbe A™ Index results.
If an Index is not completed or is in Transition it is not included.

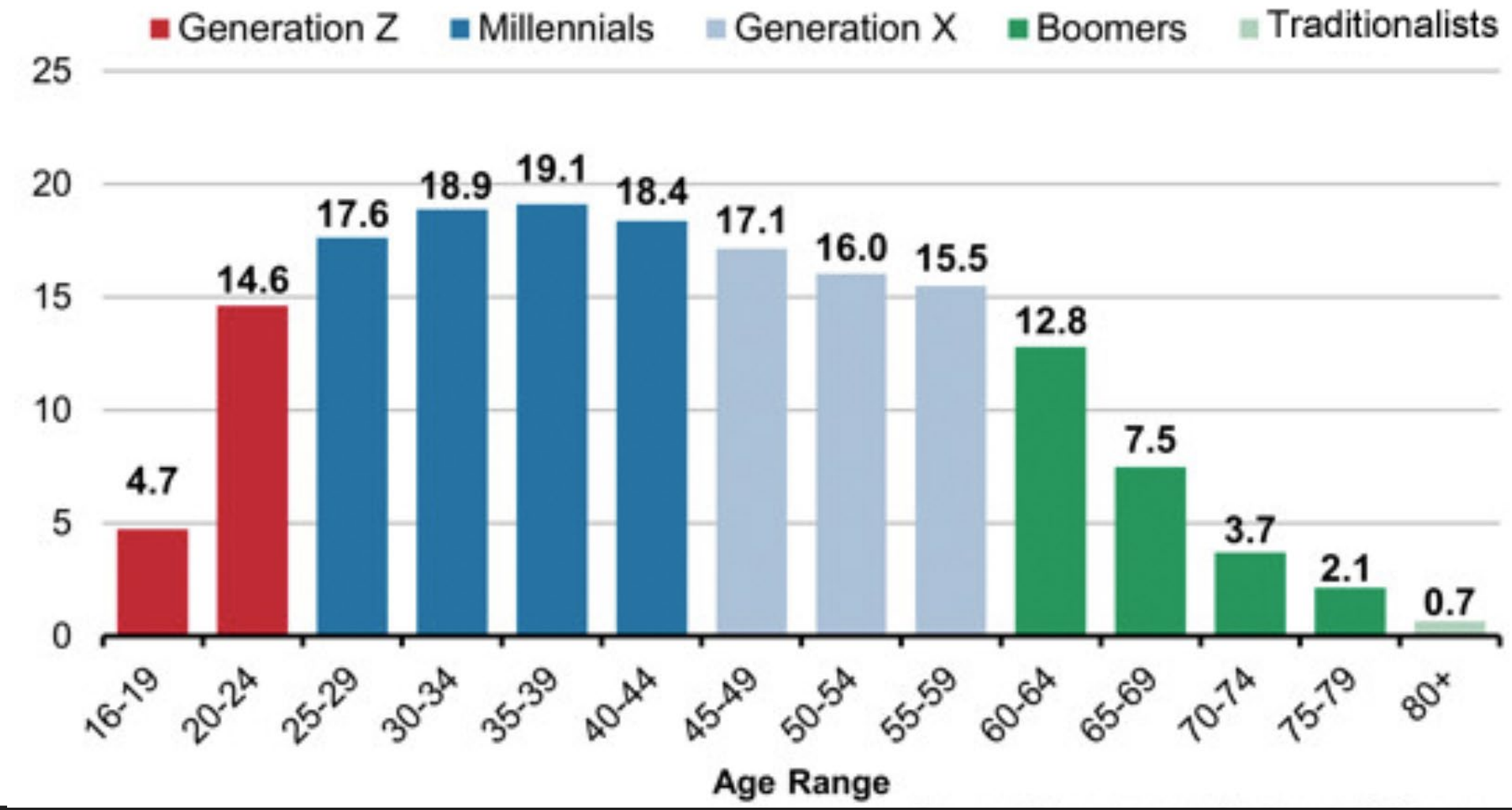
CC = There is 1 or more instance of a HIGH degree of Conative Cloning in the specific mode.
MM = There is 1 or more instance of Missing Methods in the specific mode.

Aligned


Passionate About
Best in the World At
Drives Your Economic Engine
Passionate About
Best in the World At
Drives Your Energy
Organization
Individuals

The Workforce in 2025

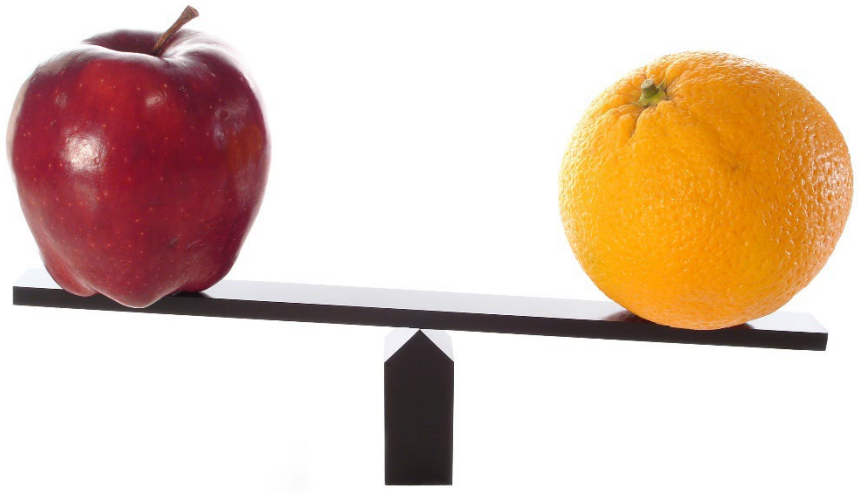
Projected size of U.S. labor force (in millions) by age, for the year 2025



Creating a Culture

FINITE

- Score keep against others: finite



INFINITE

- Score keep against yourself: infinite
- You are your own company
- Strive to be better everyday
- Out do yourself
- It's the long journey

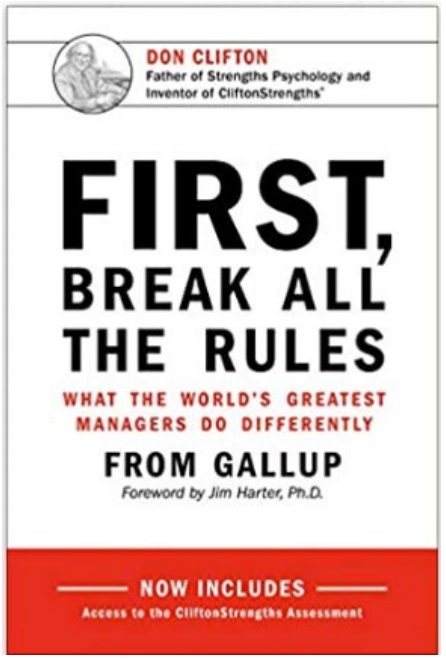
Stack the Deck

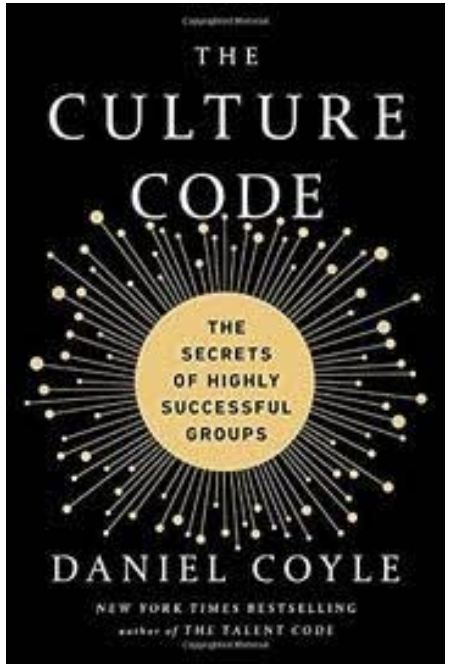
HIRE THOSE MOTIVATED BY INSTRINSIC FACTORS:

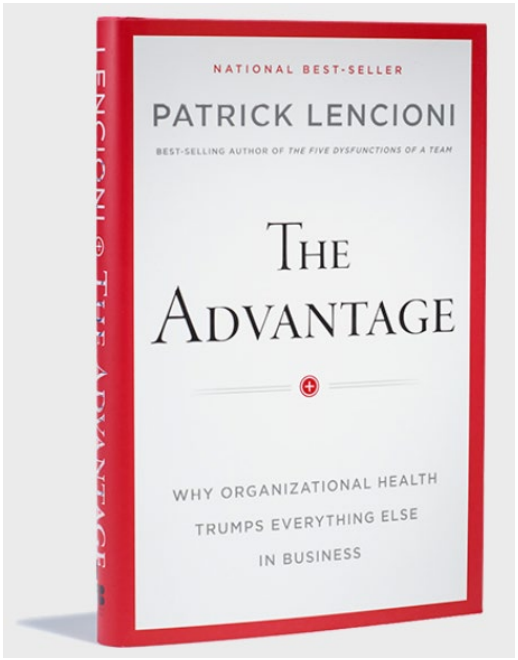
- Ownership Mentality
- Passion for what you believe
  - servant mentality
  - problem solving
  - critical thinking
  - continuous improvement
- Positivity
- Striving

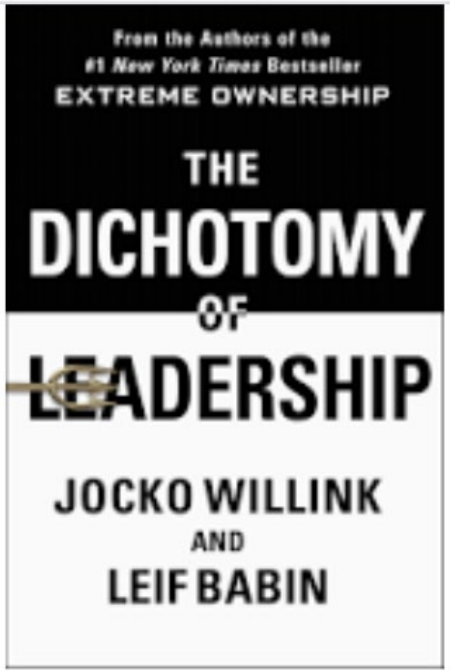
Requires Perseverance

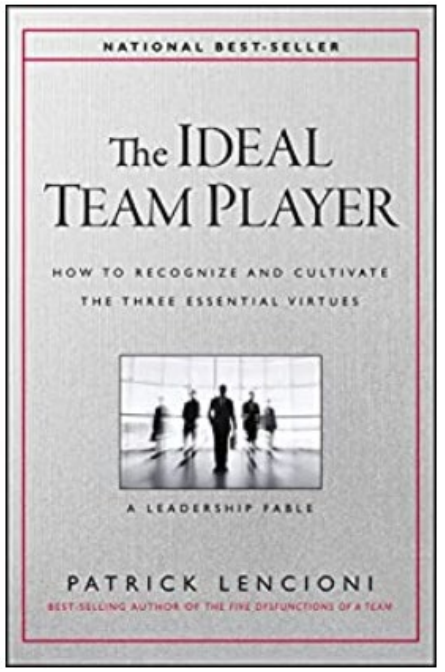
- Keeping it alive
- Holding people accountable
- Reinforce all the time
- Walk-the-talk











Leadership & Team Development

Transform

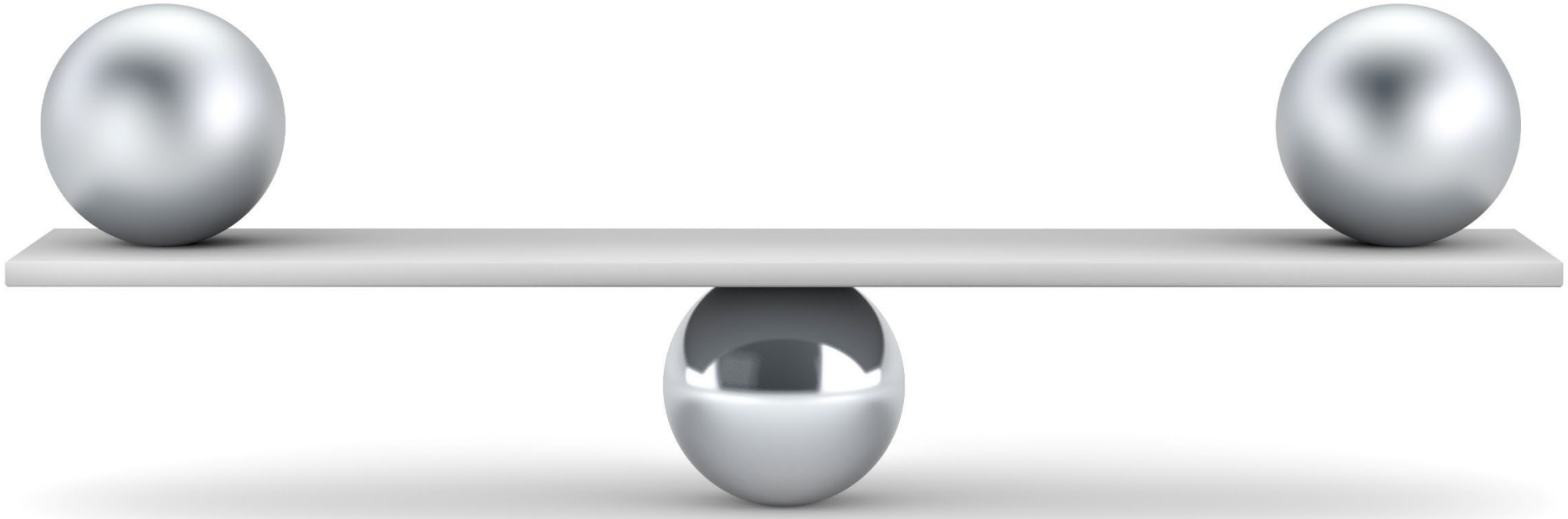
the experience

- the mindset
- the culture
- the team

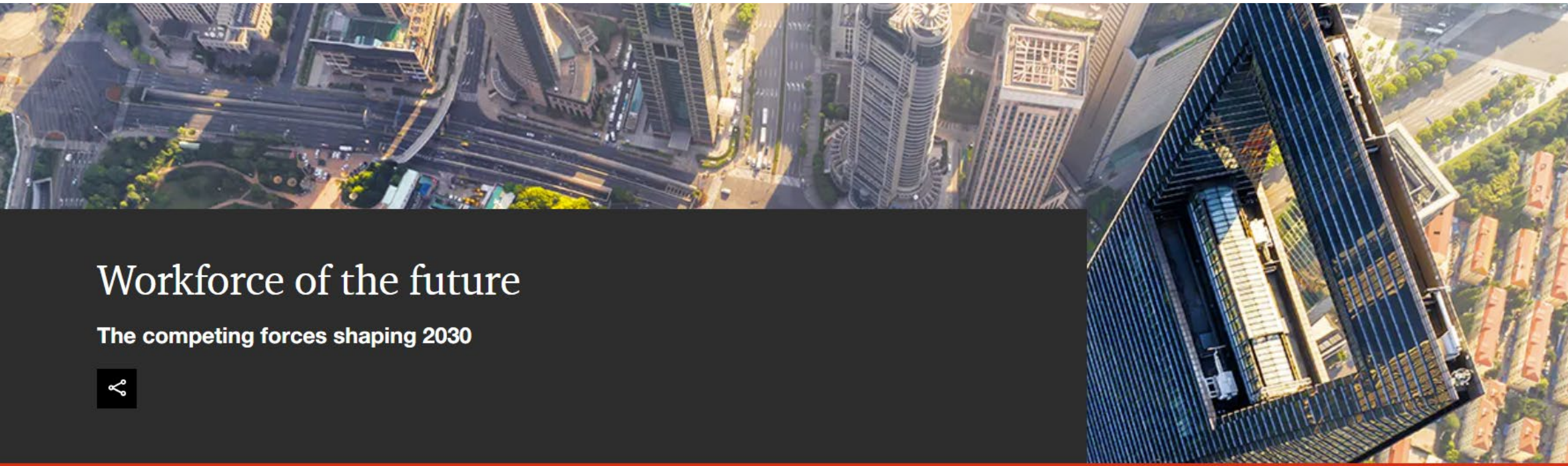
Modernize

the tools

- the data management
- the technology
- the delivery system
- the communication



workplace trends that are sure to draw the lines between employment today and in the future



Workforce of the future

The competing forces shaping 2030

37%

are worried about automation putting jobs at risk - up from 33% in 2014.

74%

are ready to learn new skills or re-train to remain employable in the future.

60%

think 'few people will have stable, long-term employment in the future'.

73%

think technology can never replace the human mind.

High-Level Metrics

Best Practices - < $2M - $5M agencies

Organic Growth 8.3%	Sales Velocity 15.3%	Pro Forma EBITDA 27.8%	Pro Forma Operating Profit 18.9%
Rule of 20 Score 23.7	# of Employees 22	Rev/Employee $176K	Spread per Employee $80K

“Is the biggest risk agencies face not taking enough risk?”

CATALYIT

Rise of Self-Employment and Freelancing

- Significant drop in permanent contracts
- Flexibility provided by the gig economy
- 10.3M self-employed people by 2026 (up 8% from 2016)

Adoption of Functional Artificial Intelligence

- Increasing productivity by 40%
- Tech has created more jobs than destroyed them
- AI will create new occupations

Office-Less Companies and Remote Workers

- Digital nomads
- Telecommuters

Non-Hierarchical Management

- Collaboration
- Flexibility
- Creativity
- Fewer levels of management

Employee Empowerment

- Prioritizing needs of employees

https://skillroads.com/

Data-Driven Offices

- Extensive interaction with IoT
- Leveraging operational space to allow for collaboration
- Flexible work styles

New Types of Professions

- IoT
- Cybersecurity
- Robotics
- Self-driving cars
- Programming
- Social media

Nuanced Digitization

- Digitization is an excellent way for storing information
- Still a demand for paper

https://skillroads.com/

Adoption of Functional Artificial Intelligence

- Increasing productivity by 40%
- Tech has created more jobs than destroyed them
- AI will create new occupations

Growing Jobs

Machine Learning Engineers
Deep Learning Engineers
Senior Data Engineers
Computer vision engineer
Data scientists
Data warehouse architects

Fastest growing areas:
Robotics
Autonomous driving
Facial recognition

https://skillroads.com/

Will robots take my job?

CHATGPT

CATALYIT

Getting Started with Generative AI Series

Catalyit can help you leverage GenAI. After completing four sessions with Steve Anderson, you'll be confident using GenAI tools, getting your staff onboard, and exploring new ideas.

Available Now

- Get Started with GenAI
- Marketing, Sales, & Customer Service
- Business Intelligence
- Audio & Visual Content

Articles

- Why GenAI is Important for Insurance Agents
- No Tech Experience Needed: Practical AI Prompts for Independent Insurance Agents
- The Power of AI-Driven Data Insights
- Navigating the Impact of AI in Cybersecurity

Catalyit Guide: https://catalyit.com/generative-ai/

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State of Tech Report 2024

https://catalyit.com/techstack/

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2024 Key Findings

Tool Utilization Challenges: "Getting the most out of the tool" remains a significant challenge, highlighting issues with technological redundancy and staff change management.

Generative AI: Few agencies recognize GenAI as a significant new technology. Catalyit believes it will significantly impact agency operations and profitability, surpassing any technology in the last 15 years.

Marketing Automation: Since 2022, 16% more agencies have adopted marketing automation platforms

Reputation Management: There has been a slight increase in the use of reputation management tools.

Cybersecurity: This remains a major vulnerability, especially with increased employee workloads. Agencies need to differentiate between general IT/MSP services and specialized cybersecurity consultants.

Data Analytics: More agencies should utilize data analytics tools to gain strategic insights, make informed business decisions, and improve overall efficiency and performance.

Commercial Lines Quoting/Rating Platforms: The use of these platforms continues to grow, with 24% of respondents using at least one solution.

Overall Technology Use: Since last year's report, there has been no significant improvement in agencies' use of technology.

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Modernize

https://catalyit.com/techassessment/

- Answer the assessment questions below (takes less than 20 minutes)
- Your custom roadmap will be crafted and emailed to you
- Catalyit will schedule a 30-minute call to answer any questions you have from the findings and set you on the path to success

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The Catalyit Success Journey™
Baseline
Building a strong foundation
Better
Building stronger structures
Best
Ranked in Top 25%
Beyond
Eager adoption of new trends

Baseline

- Basic Agency Management System (AMS)
- Accounting System (if not in AMS)
- Office 365 Business Premium
- VoIP Phone System
- Website
- Social Media Presence
- Video Conferencing Service
- Antivirus Software

Better

Baseline, plus...

- Agency Management System (AMS)
- Quoting System Integrated w/ AMS
- Active Website Development Process
- Paid Social Media Management Tool
- E-signature
- Electronic Fax
- Registered Email
- Lead Generation
- Managed Technology Services
- Managed Cyber Protection
- Offsite and Onsite Backup

Best

Better, plus...

- Full Agency Management System (AMS)
- Commercial Lines Quoting
- Group Benefits Quoting
- Carrier Submission Management
- Website Chatbot
- Outsourcing
- Paid Social Media Management Tool Across All Platforms
- Sales Management Software (CRM and Pipeline Management)
- Video Production
- Client Portal for Service
- Prospect Website Quoting
- Encrypted Email
- Marketing Automation
- Text Messaging Management
- Online Reputation Management
- Accept Digital Payments

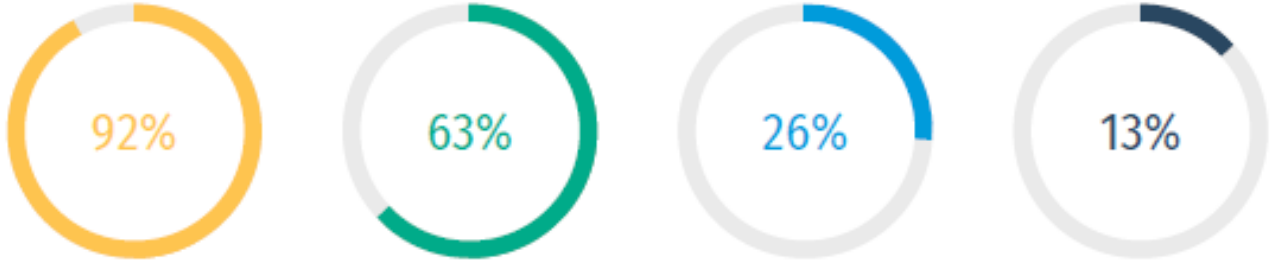
Beyond

Best, plus...

- Using RPA to Automate Repetitive Tasks
- Harnessing Data Analytics to Better Serve Customers and Grow
- Creating Specialized Programs to Grow Your Agency
- Agency Branded Mobile App
- Automated Renewal Reviews
- Website Content in Audio Format
- Website in Multiple Languages

The Catalyit Success Journey™

Your Results:



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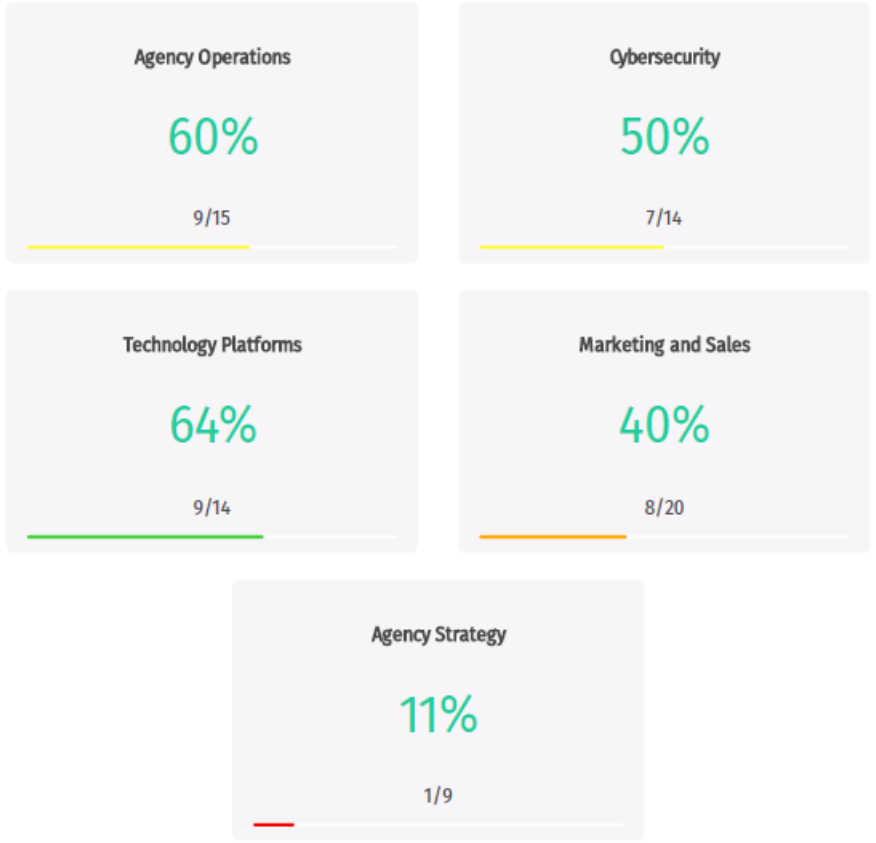
Your Agency Tech Score: 47%

Technology Pragmatist

Organizations that are technology pragmatist tend to adopt new technologies only after others have tested it. They want assurances that new versions of existing programs will work well. They will consider implementing new technology only after they have received solid references and assurances from technology enthusiasts that the new product or service will not be a failure when implemented within their organization.

They are careful to make sure that any new technology they adopt will not cause more problems than it solves. Technology pragmatists are the most common type of insurance organization.



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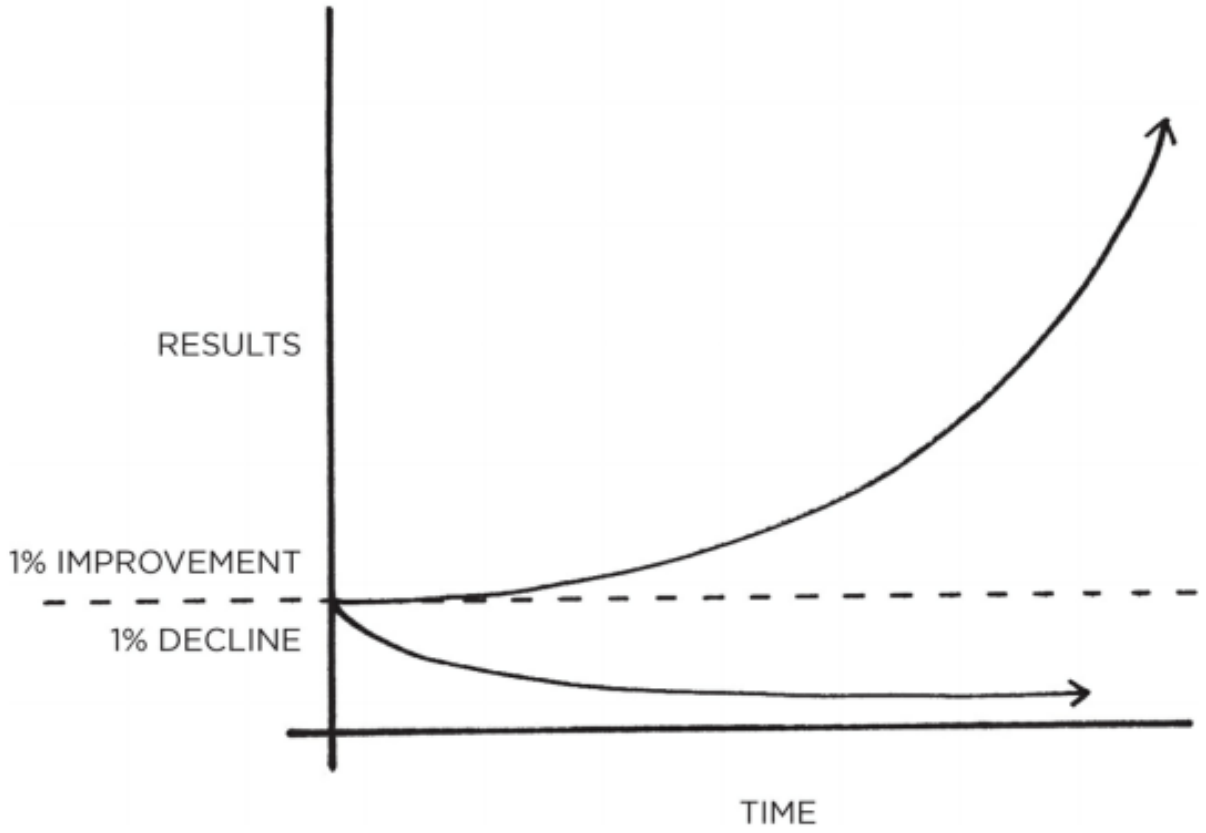
1% BETTER EVERY DAY

1% worse every day for one year. $0.99^{365} = 00.03$

1% better every day for one year. $1.01^{365} = 37.78$

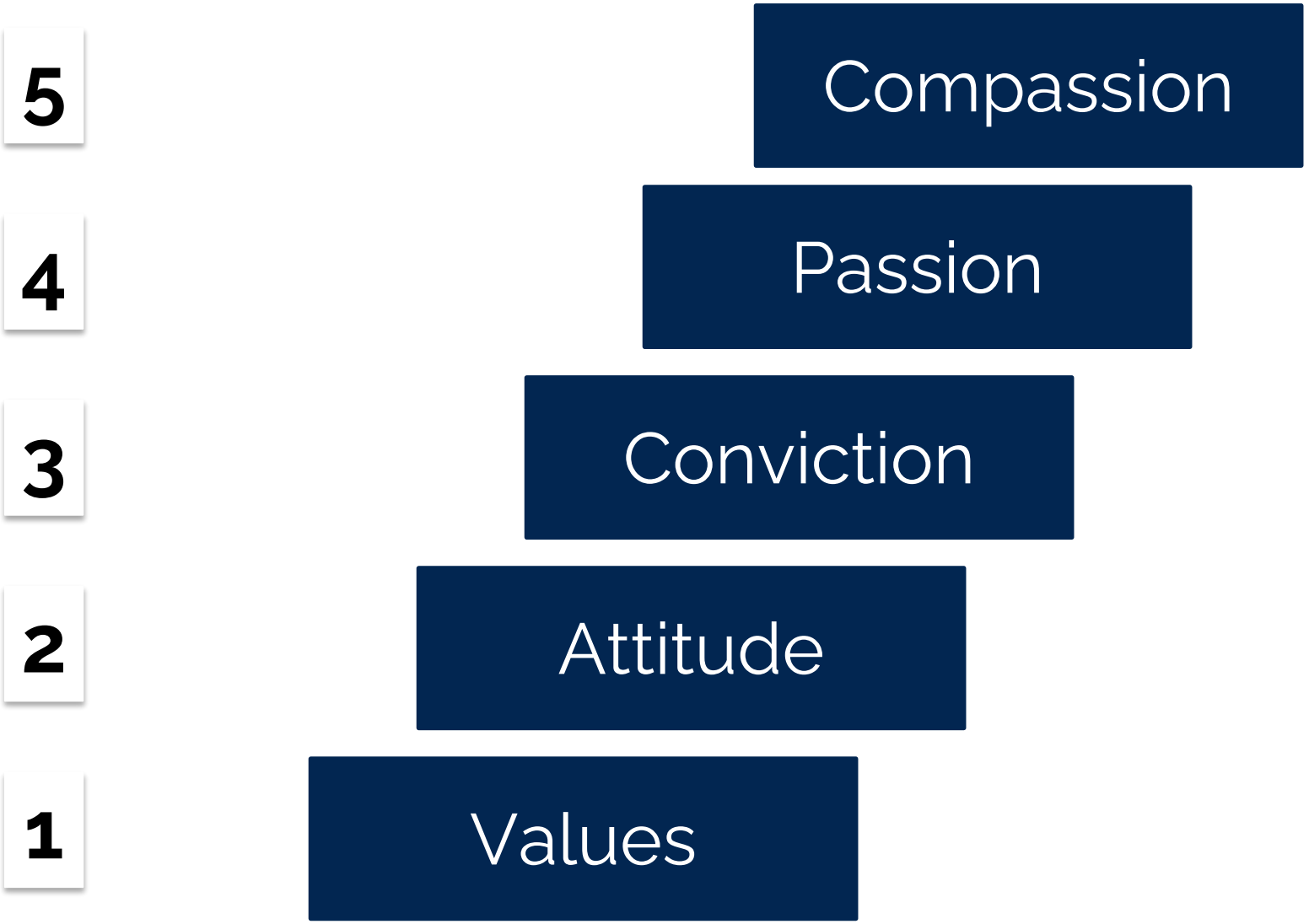


that one critical thing...

What is your goal?
Who will you ask to help?

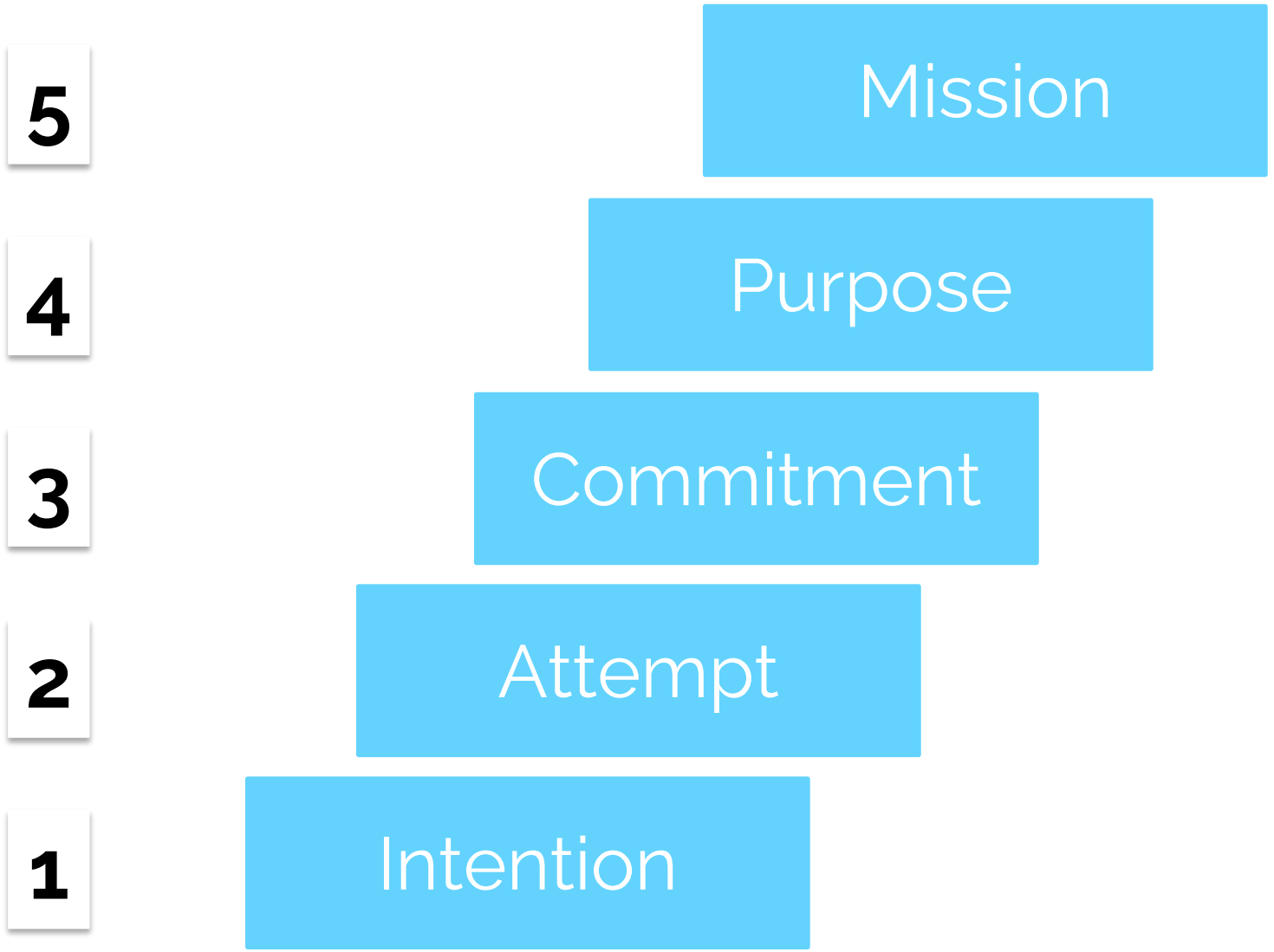
the challenge

Motivation



Skill

Time/Action

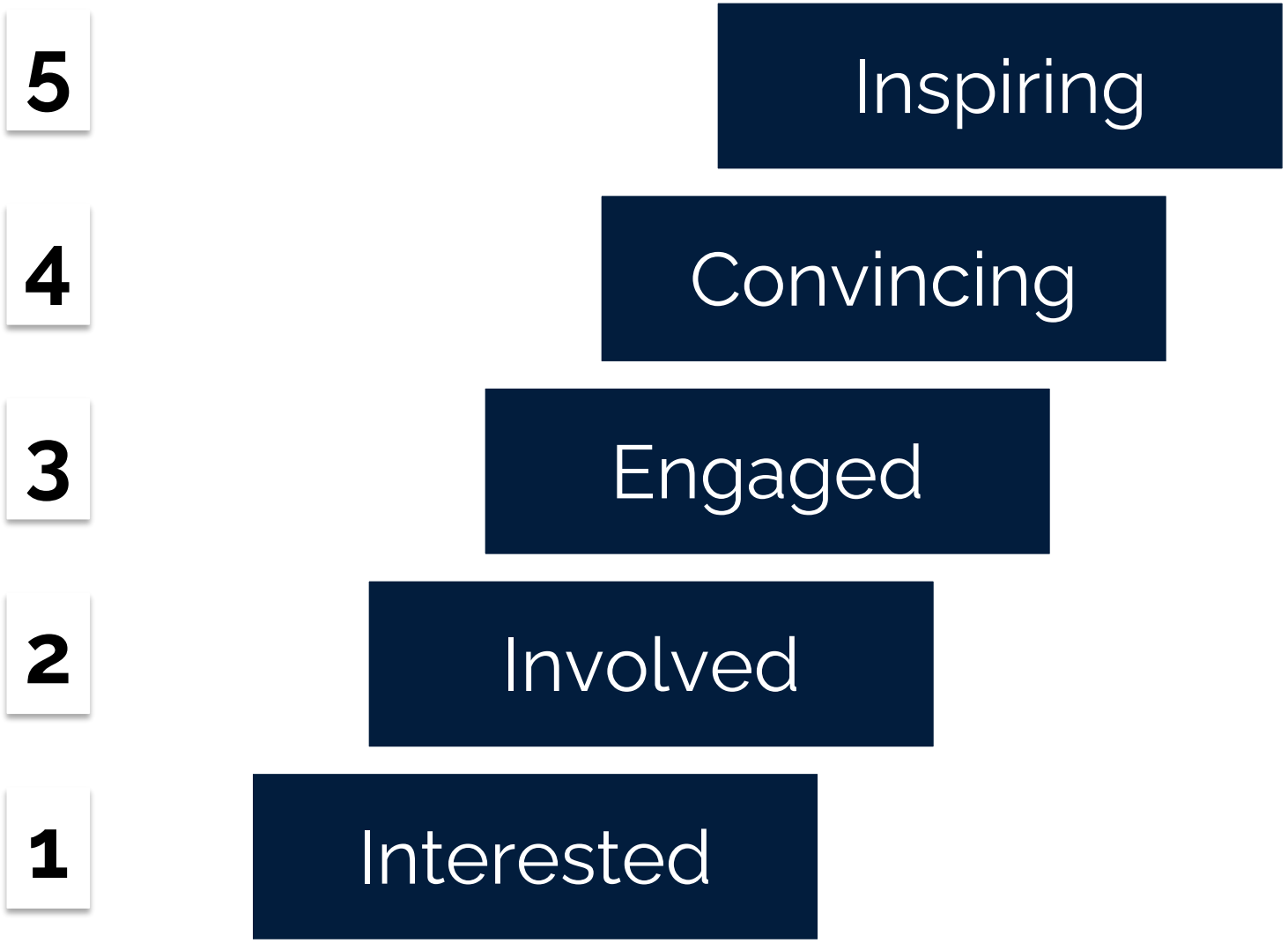


Level 3

5
Compassion
Vision
Mission
4
Passion
Persuasion
Purpose
3
Conviction
Evaluation
Commitment
2
Attitude
Analyses
Attempt
1
Values
Knowledge
Intention

As a Team

As Leaders



for individuals, character is destiny

for companies, **culture** is destiny

gatewaypeople.com