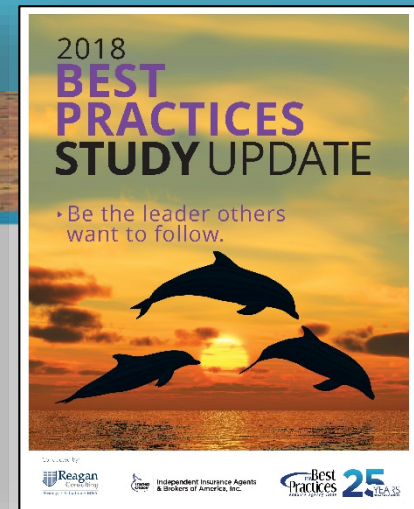
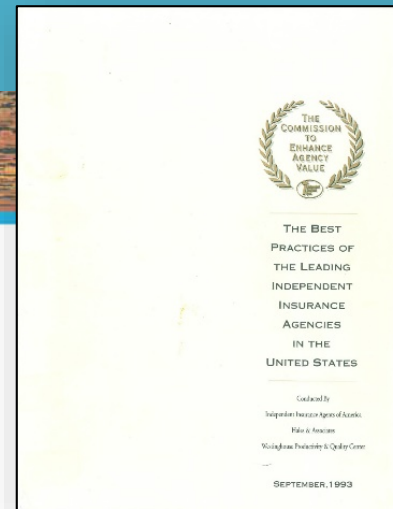


2018 *Best Practices* Overview

Tom Doran / Reagan Consulting
September 18, 2018



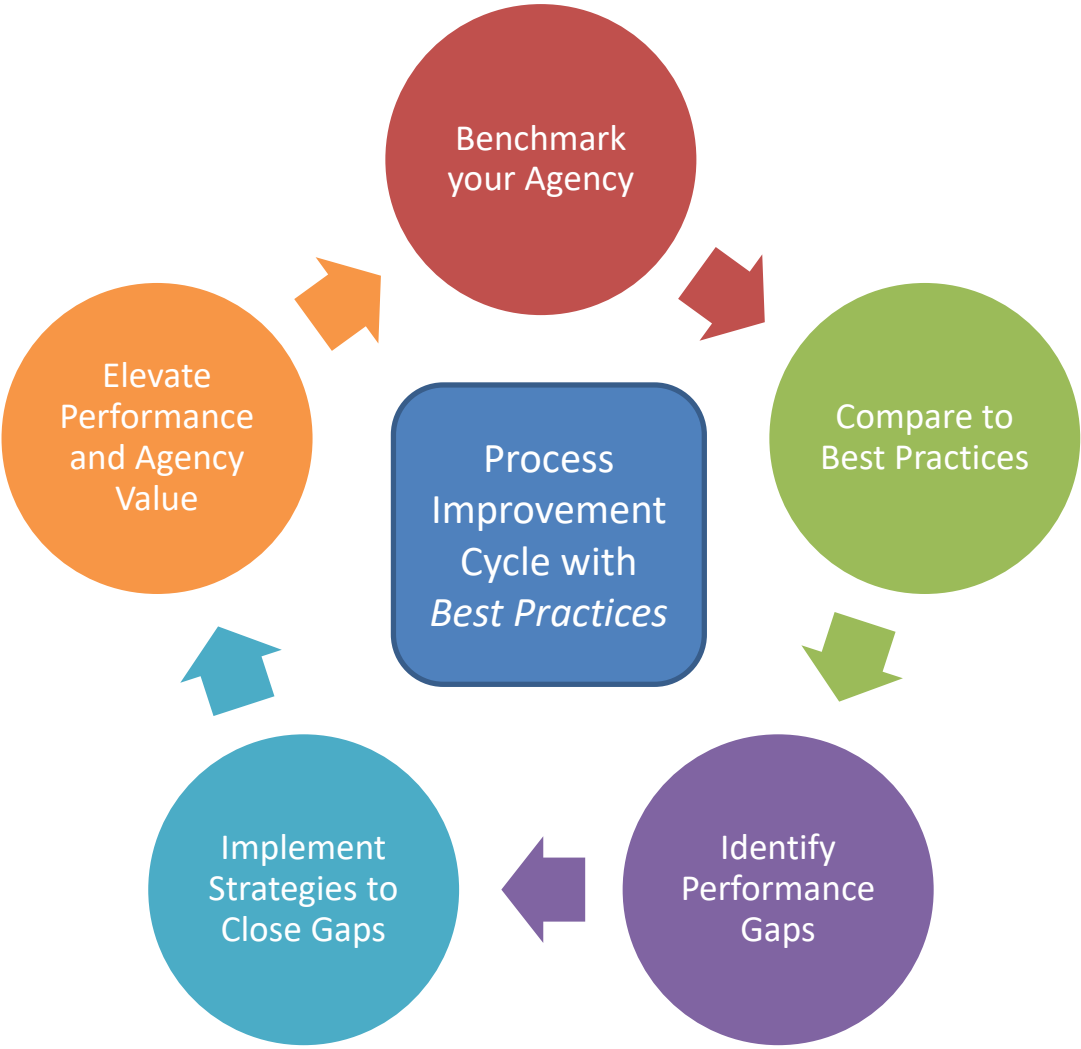
BACK TO THE FUTURE



Independent Insurance Agents
& Brokers of America, Inc.

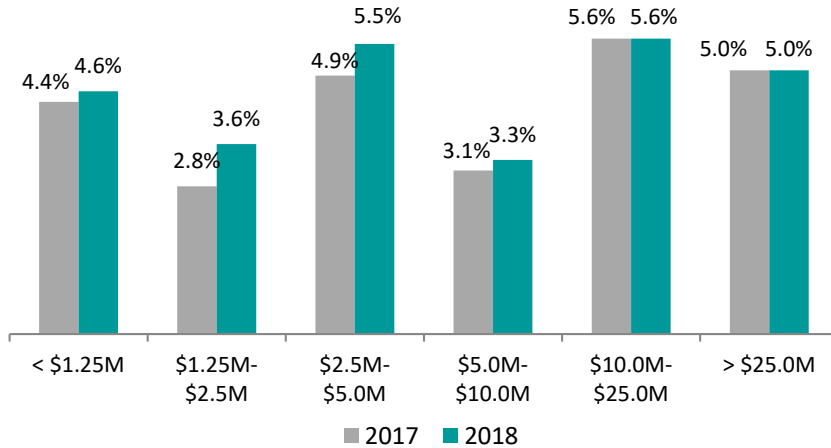


Process Improvement Cycle

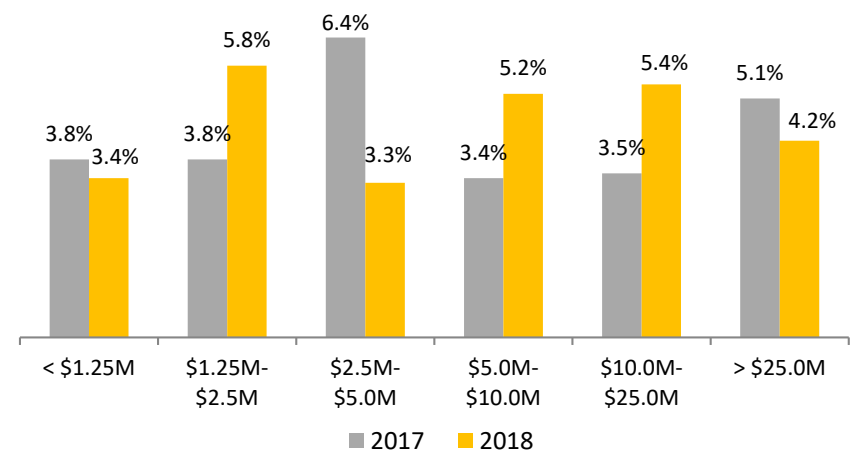


Organic Growth by Line of Business

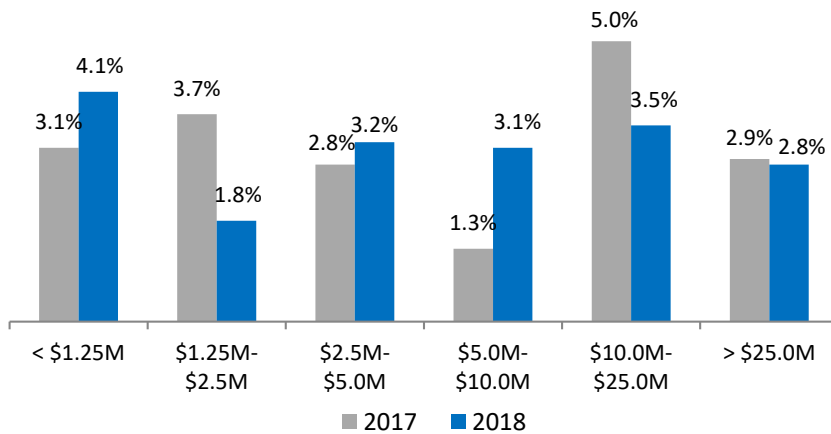
Total Agency



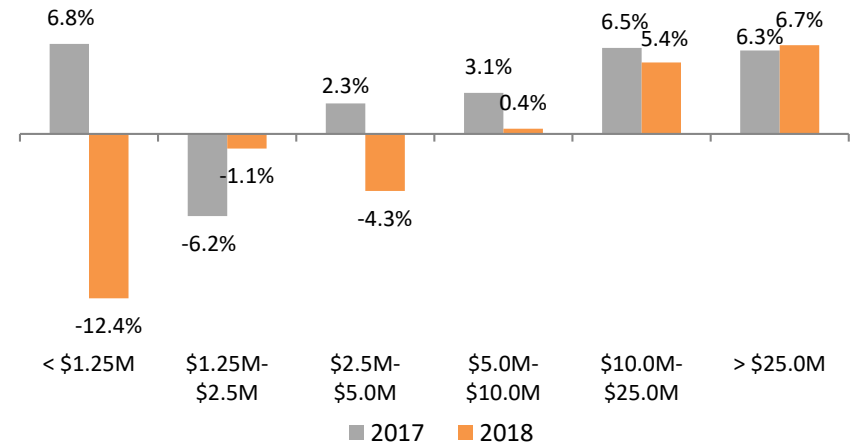
Commercial P&C Lines



Personal Lines

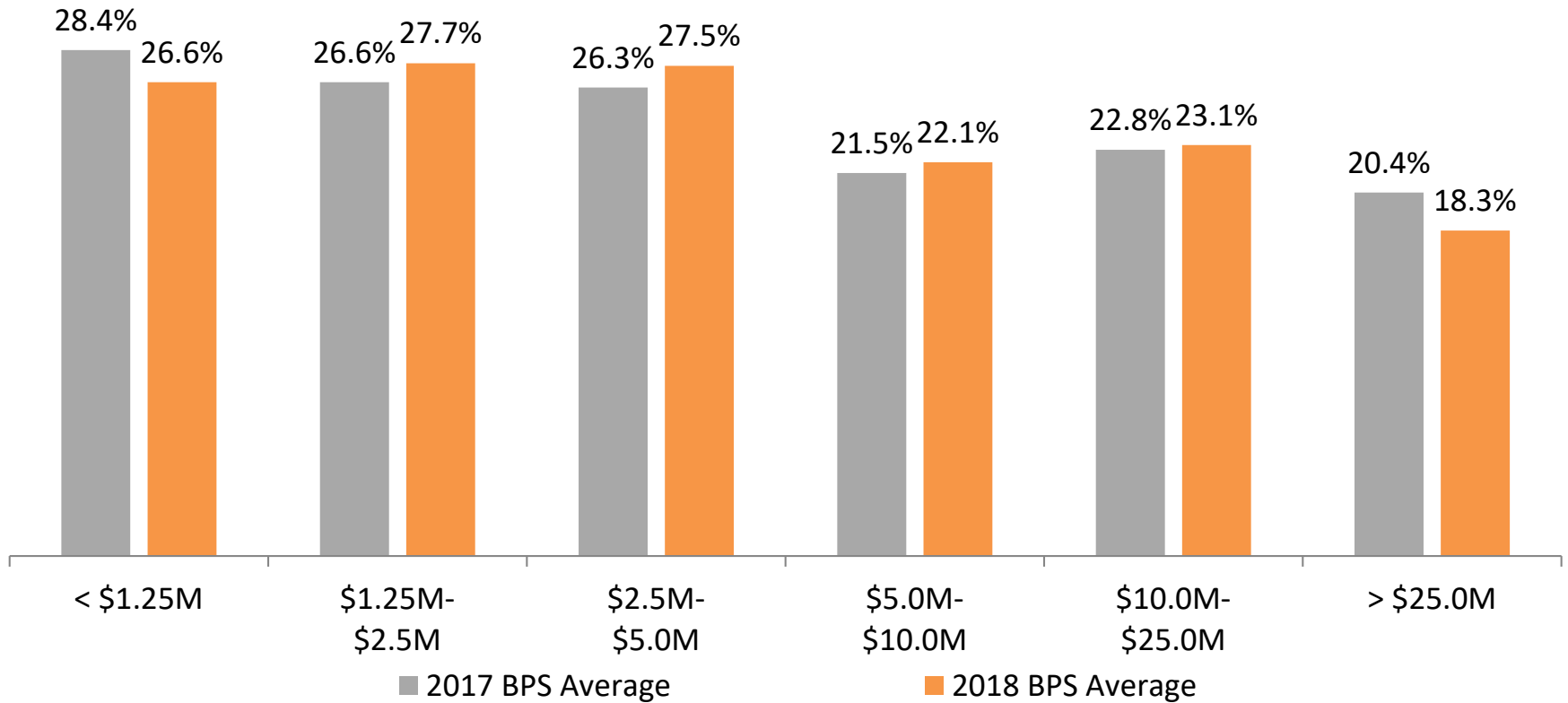


Group L/H/F



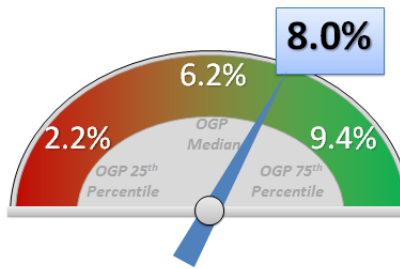
Profitability

Pro Forma EBITDA

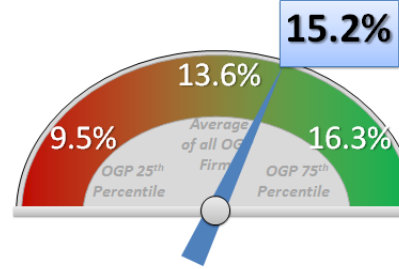


A Hypothetical Metric Dashboard

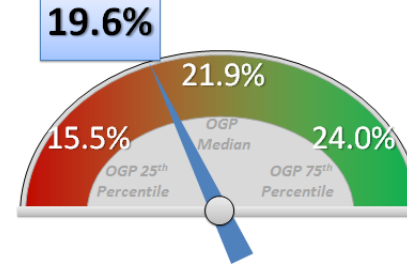
Organic Growth



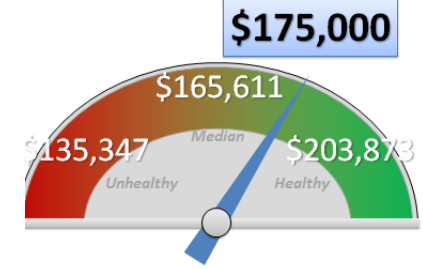
Sales Velocity



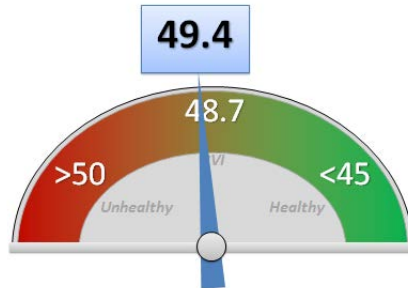
EBITDA Margin



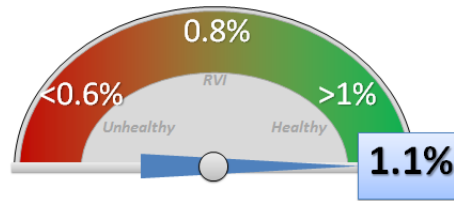
Revenue per Employee



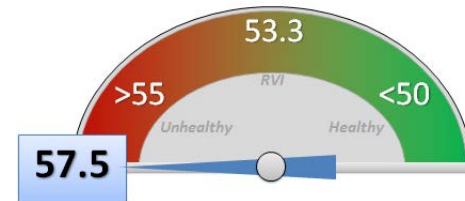
WAPA



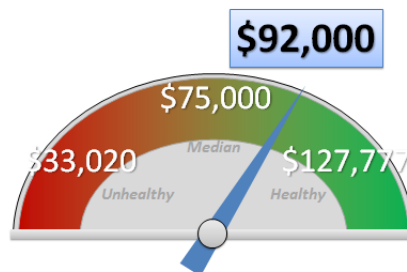
Effective NUPP



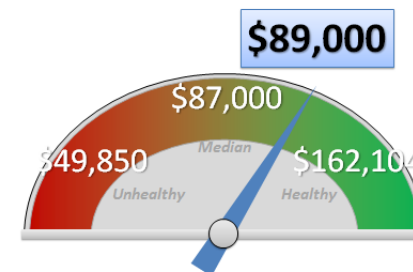
WASA



New Business per Validated CL Producer



New Business per Validated EB Producer



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Tom Doran has been with Reagan Consulting since its founding and is a partner of the firm. Tom's areas of expertise include merger and acquisition representation, agency valuation, ownership perpetuation planning, agency valuation enhancement and strategic planning facilitation.

Before joining Reagan Consulting, Tom was a consultant with Hales and Associates, and worked in the computer industry, both as a software developer and as a management consultant.

Tom is a regular contributor to Reagan Consulting's industry studies and is frequently published in various insurance industry publications. He also speaks on a regular basis to industry trade groups and associations on a wide variety of topics concerning the insurance distribution system.

Tom is a Certified Valuation Analyst (CVA) with an undergraduate degree in Computer Information Systems and an MBA from Georgia State University. He currently maintains the Series 63 and 79 FINRA Registrations through Reagan Securities, Inc., the affiliated FINRA-registered Broker/Dealer of Reagan Consulting, Inc.