

Bruce Carr Consultation Testimonial

One of our corporate goals this year is to formalize our Business Development Process, in order to develop a system that will allow us to deliver consistent quality and ensure predictable results. We also want to consolidate our intellectual capital and be able to easily guide new Account Directors.

To help us achieve this, we have employed Bruce Carr as a consultant twice a month.

Bruce has helped create a “Business Development Model,” which brings consistency to our process. We have begun being able to discuss accounts and provide input to each other with greater understanding, since we all understand and utilize the same vocabulary.

Bruce also attended our Business Development meetings twice a month to offer new perspectives and ideas, and held one-on-one sessions with Account Directors to drill down on how to externally focus on existing clients and prospects.

Through his efforts, we have seen both immediate benefits and potential long-term gains.

Our 1st quarter results have exceeded our budget. By working with the Account Directors on real-life situations, they have gained knowledge they can immediately put into practice. As they see the results, they gain enthusiasm for the process of being externally focused.

And as the Account Directors continue to focus externally, we see a move towards using all our talents and resources (Commercial Insurance Division, Employee Benefits Division, Personal Insurance Division, and Financial Services Unit) to meet the clients overall objectives. This positions us as a trusted advisor to the client, rather than a salesperson. One who can look at the big picture, clarify the overall business goals and provide solutions, even outside our capability range.

We are excited about the potential for long-term business relationships and are looking forward to continued success working with Bruce.

Ceree Harden
CEO
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