

## Not a Commodity

Everyone deals with the threat of commoditization, because many customers believe that insurance services and providers are interchangeable. One way in which firms can differentiate themselves is to increase the value of their consultative services by developing effective business relationships that are based on a value proposition.

At our March IAC meeting, veteran industry consultant Rob Ekern will provide attendees with information on the “Consultative Brokerage” philosophy that he has provided to many of the country’s top brokerage firms over the past 15 years. Attendees will learn how total cost of risk (TCOR) and a quantifiable value proposition can help insurance organizations succeed, particularly in a firming marketplace characterized by rising premiums. They will also get tips on developing the culture and the strategies that will enable their organizations to leverage both direct and indirect costs of risk that can make premium a secondary concern in the decision-making process.

Attendees will learn how to:

- Create "Real" Differentiation Inside Their Firms
- Deliver a Quantifiable Difference to Buyers
- Consistently Create Larger Revenue Accounts
- Double Their Large Account Hit Ratios
- Close the Door to Other Competitors
- Prosper in the Hardening Marketplace

For more information on Rob Ekern, visit <[www.crekern.com](http://www.crekern.com)>.

The event is exclusively for ReSource Pro clients. There is no cost to attend, but **space is very limited**, and attendees will be determined on a first come, first served basis. To attend this meeting, please email [Sophie@resourcepro.com](mailto:Sophie@resourcepro.com) or call 212.297.3183. You can also notify us through your client adviser, Tom Piegari or Marilyn Norman.

### SCHEDULE

#### Wednesday 3/14

6:30pm: Dinner for all ReSource Pro clients

Location: Boudros Texas Bistro (<http://www.boudros.com/boudros/map.php>)

#### Thursday 3/15

8:30-5pm: Workshop

Location: **Hyatt Regency San Antonio**, 123 Losoya, San Antonio, Texas, USA 78205

### AGENDA for Thursday 3/15/2012

***This is a tentative agenda. A final agenda will be distributed the day of the meeting.***

Breakfast

9:00 – 10:15 The Importance of a "Real" Value Proposition

Break

10:30 – 12:00 Understanding the Pressure Points of Creating a Quantifiable Value

Lunch

1:00 – 2:00 Creating the Conceptual Sale

2:00 – 3:00 The Keys to Effective Stewardship Reports

Break

3:00 – 5:00 Case Studies and Action Plans, Q & A

### **OTHER INFORMATION**

#### **Accommodations:**

We have secured a block of rooms at the Hyatt Regency for the rate of \$179 per room (plus tax), but the **group rate is available only until February 22<sup>nd</sup>**. Please make your reservations in advance of the deadline.

#### **Room Block Access**

Weblink: <https://resweb.passkey.com/go/ResourceProMeeting>

Toll-Free Number: 1-888-421-1442

Group Block Name and Code: G-RPRO

Cut-off Date: 2/22/12

#### **Dinner:**

We hope all of the attendees will be joining us for dinner on Wednesday night. We are meeting at 6:30 at Boudros Texas Bistro. The restaurant is within walking distance from the hotel.

(<http://www.boudros.com/boudros/map.php>)

#### **Material:**

ReSource Pro will be supplying each attendee with Rob Eckern's book "**Consultative Brokerage®: A Value Strategy**" and other material you will need for the workshop. You can also follow us on [blog.resourcepro.com](http://blog.resourcepro.com), where we will be posting articles and relevant information in advance of the meeting and post-meeting summaries.



Innovation Advisory Council Meeting  
San Antonio TX – March 14 & 15, 2012

**Attire:**

Dress code for this event is business casual.

**Dietary Considerations:**

A vegetarian option will be available during meals. Please notify Sophie at [Sophie@resourcepro.com](mailto:Sophie@resourcepro.com) with any other dietary considerations.