

28. RHSB Practice Groups

Time: 2 Hours

Who: David Kohl / Doug Jones / Karen Farris

Where: Dallas Conference Room

Overview

The purpose of this meeting is to give the new producer an overview of our current practice groups

Objectives

As a result of this activity, the new Producer will have an understanding of

- Our verticals and how they developed
- Areas / Industries where we don't currently have expertise or a client base
- Recognizing that Employee Benefits can be considered its own "Practice Group" how can a benefits producer leverage P&C Practice Group expertise?
- Are there any new areas of opportunity that we should explore?
- Next steps for building out a Practice Group

Steps

1. Review current book of business stats
2. Review of current website information our Practice Groups – how would you improve?
What are our competitors doing?

Materials

Follow-Up