

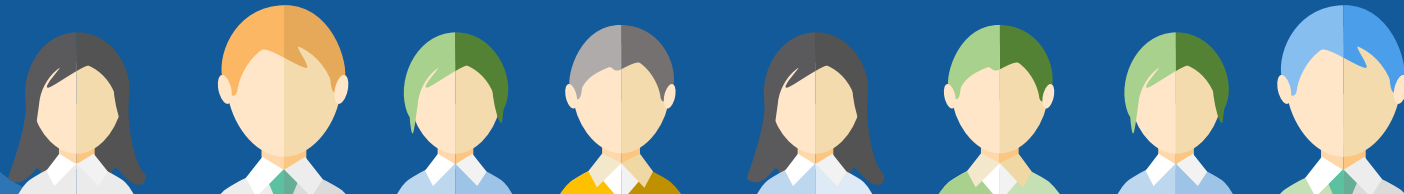
2023/2024

Loud Impact

BLUEPRINT FOR EMERGING
COMMERCIAL INSURANCE
PRODUCER SUCCESS



BY JAMES LOUD



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Vision

Redefine the landscape of commercial insurance in Orange and San Diego counties through unparalleled expertise, unwavering commitment to client success, and innovative risk management solutions. To not just meet but exceed client expectations, establishing a new benchmark for service excellence and reliability in the commercial insurance sector.

Mission

Empower businesses with comprehensive, tailored insurance solutions that safeguard their future and foster growth. To commit to building lasting relationships based on trust, integrity, and a deep understanding of each client's unique needs. Through continuous learning, proactive client engagement, and leveraging extensive industry networks, I aim to deliver top-tier, personalized insurance services that contribute significantly to my clients' peace of mind and business resilience.



My Background



JAMES LOUD

I've faced many challenges head-on, seeing them not as obstacles but as opportunities to grow and excel. My determination to push harder than most has been a key factor in overcoming adversity. I thrive on tackling extreme challenges, finding a unique sense of fulfillment in navigating complex situations. Throughout it all, maintaining my integrity has been non-negotiable. This commitment to ethical practices and resilience has not only shaped my professional journey but also defined who I am as a person.

Experience

Area Manager, Guaranteed Rate Affinity
(Covering San Diego, South Orange County & the Inland Empire) 2018-2023

Managing Partner, Film Vision Studios - 2023

Wealth Management Loan Originator, PMB, CPCG, US Bank - 2015-2018

Arizona State University

BS - Organizational Leadership, 2016



30-90 Day Plan

Orientation, Training & Licensing

Training & Licensing:

- Begin comprehensive training in commercial insurance products, sales techniques, and industry regulations.
- Initiate the process for obtaining any additional required insurance licenses.

Research & Networking:

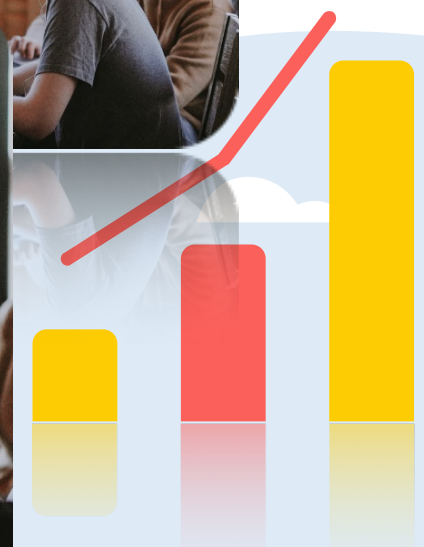
- Identify and join key organizations in Orange and San Diego counties, such as the Orange County Chamber of Commerce, San Diego Regional Chamber of Commerce, National Association of Industrial and Office Properties (NAIOP), Urban Land Institute (ULI), Tech Coast Angels, Biocom, and CleanTECH San Diego to get started.
- Attend introductory events or meetings to understand their schedules and activities.
- Establish connections with one or two mentors and schedule monthly meetings to facilitate professional development and guidance.

Market Analysis:

- Start researching five target companies in Orange and San Diego counties for potential insurance needs. Focus on industries like Real Estate Development, Technology, Biotech, and Manufacturing.

Developing Contacts:

- Begin building a list of contacts from personal and professional networks for future outreach.



90-120 Day Plan

Deepening Knowledge & Networking

Licensing Completion:

- Finalize any pending insurance licensing requirements.

Advanced Training:

- Continue advanced training in specific commercial insurance products and sales strategies.

Active Networking:

- Regular attendance at events and meetings of joined organizations.
- Engage with members, share expertise, and gather market intelligence.

Company Research

- Conduct detailed analysis of the five identified companies, including their risk profiles, current insurance coverage, and potential needs.

Initiate Outreach

- Start reaching out to personal and professional contacts to announce my new role and gauge potential interest or referrals.



120+ Day Plan

Sales Activity & Client Acquisition

Sales Calls Initiation:

- Begin 20 calls per day plan, aiming for at least 2 meetings per week. This includes cold calls, follow-ups, and leveraging contacts.
- Use Bolton's CRM system to track calls, meetings, and progress.

First Client Meetings:

- Conduct initial meetings with potential clients. Focus on understanding their needs and building rapport.

Proposal & Quoting:

- Start preparing and presenting insurance proposals based on the meetings.

Review & Adjust:

- Continuously review call strategies and meeting approaches. Adjust tactics based on feedback and outcomes.



Continued Commitment

Year-End Goal (2024):

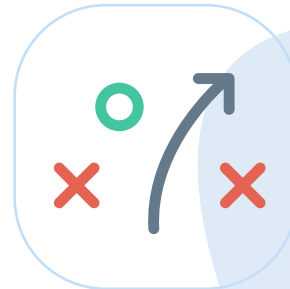
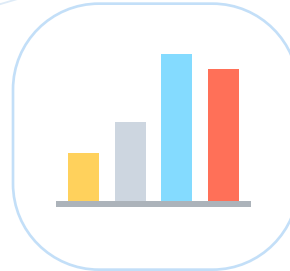
- Aim to secure six accounts in my book within the first year, focusing on consistent client engagement and follow-ups to increase bind rates.

KPI's & Metrics:

- Track key performance indicators such as call numbers, meeting frequency, proposal presentations, and successful binds.
- Regularly review and adjust sales strategies to improve effectiveness and efficiency.

Ongoing Development:

- Continue networking and attending industry events.
- Keep abreast of market trends and updates in commercial insurance.
- Seek feedback and mentorship within Bolton to refine sales techniques.





Conclusion

As I embark on this exciting journey within the commercial insurance realm, I bring with me a wealth of experience from the mortgage and financial services industries. This background has equipped me with a keen understanding of strategic sales, risk management, and a deep commitment to client service.

My goal is to leverage these skills to not only meet but exceed our targets, aiming to bind 6 major accounts within the first 12-18 months.

I am prepared to tackle the challenges ahead, confident that my resilience and determination will turn these into opportunities for growth and success. My focus is set on immersing myself in the vibrant communities of Orange and San Diego counties, building strong relationships, and contributing positively to the businesses we serve.

With a clear vision and steadfast integrity, I am enthusiastic about setting a new standard of excellence in the commercial insurance industry.

- James Austin Loud

