Growth Engine approach framework – working within a large organization

This is the structure I used to initially frame the **Growth Engine** opportunity, utilizing a problem statement and objective facts, to clearly communicate the challenge, the strategy and the desired outcome. This secured approval for the program.

---

1. Challenge before us

As consumer insurance buying trends continually shift, _____ needs agent digital capabilities that; differentiates _____, facilitates ease-of-use, enables agents to acquire more CL & PL customers, improves online visibility, integrates off line marketing, and benefits from data analysis/insights to outperform local competitors.

Agent's are continually challenged with generating quality internet leads and converting business to good personal multi-line or commercial policies. Finding a successful and scalable solution for agents would provide a market advantage for _____ and a method for acquiring more policies and revenue.

---

2. Strategy
- Create a differentiating agent lead program, that delivers insights and performance that positions ____ as the leader in Agent digital lead programs.

---

3. Objective
- Conduct a proprietary digital marketing effort that generates and controls the lead quality/count from a variety of exclusive sources to better fit _____ appetite. Convert an agreed upon % of these through committed agencies that are properly set up to handle digital leads, close business electronically, and willing to allow full disclosure of systems, processes, tactics and insights during the pilot. Reach a profitability ROI calculated by ____ Finance, and monitor/document the effort to provide training for other agencies.

---

4. Short Term Goals
- Research and establish specific numeric goals that clarifies success at each step
- Establish a system of recording and documenting the process and successes for training - Find and agencies that are:
  - "set-up " for digital lead conversion success,
  - "willing" to provide complete transparency to agency sales
  - "willing" to paying half of the expense
  - "committed to selling a specific number of NW policies
- Gain agency agreement and commitment
- Socialize pilot with the appropriate RVP, Sales Director and SM and gain their agreement on the program and agency
- Create _____Document and gain funding
- Execute pilot, monitor, measure, report, and recommend next steps

---

5. Long Term Goals
- Create a sustainable and proprietary program that helps agents become good digital selling organizations.
- Acquire market share from _____ competitors
- Create an competitive platform that explores, determines and documents the best practices in digital lead gen that produces efficient business for _____.
- Create an evolutionary platform that explores, determines and documents the best practices in agent selling practices for digital leads and consumers
- Develop a standardized training curriculum that teaches strategic Agents how to execute effective selling practices that meet online consumer needs and improves conversion rates.
- Identify appropriate agencies who are the best candidates to partner with for future growth
- Establish an agent pricing system for the services

---

6. Scope of solution space
- _____has reviewed the agency and proforma. They are supportive of this pilot. (please see note below)

---

7. Constraints within solution space
- Dependent on Funding approval

---

8. Barriers to impact
- In the short term; ------ budget approval
- Long term; Organizational alignment, pilot performance, agent readiness