



KLR Consulting

Inspiring Success in Your Leaders and Teams

The Council of Insurance Agents & Brokers | Success Story

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The Council of Insurance Agents and Brokers (The Council), is the premier trade association for leading commercial insurance brokers. Based in Washington, D.C., The Council fosters relationships industry-wide and provides advocacy and business intelligence resources for its members.

For The Council's Board of Directors mid-year meeting this year, they wanted to focus on strategic planning, and also on defining goals and priorities for The Council.

"As a staff-driven organization, we wanted this meeting with the Board of Directors to function as a mid-year check-in on our strategic course, having them help us navigate what our priorities and goals are, and should be," said Cheryl Matochik, Vice President of Strategic Resources. "The Board represents our membership, so it was a good way to touch base with them and get their input."

Dialogue Among Diverse CEOs For Results

When The Council started looking for a facilitator for this Board of Directors, it was important that it be someone who could bring the members together and foster a dialogue.

John Tallarida, VP at member company Heffernan Insurance, suggested KLR Consulting.

For The Council, it was a bonus that she had some insurance industry experience, yet she would also provide a fresh perspective from outside the industry. "JT gave Kristi glowing reviews, which was really all we needed, but beyond that, KLR is all about building relationships, as are we, so that really clinched it for us."

With this meeting, the group wanted to come out the other side with clear priorities and goals, feedback from the Board, and an idea of how that aligns with what they already offer to the membership.

To do that required an experienced facilitator. Kristi brought that expertise to the process, and carefully laid the groundwork before the retreat. She spoke with each Board member and with the staff to gain a clear picture of the needs of the group. Working together, Kristi and Cheryl created a framework for the retreat that encouraged open discussion and clarity.

The Council

Industry: Insurance

Challenges:

- Large, diverse Board of Directors
- Gaining consensus from many CEOs
- Clarity of goals and direction

KLR Solutions:

- Facilitate Board retreat
- Small group sessions
- Clear framework for focused results
- Authoritative yet flexible facilitation for greater participation
- Executive coaching
- Ongoing follow up

Benefits of KLR Programs:

- Clear, usable results
- Increased buy-in from Board members
- Staff is inspired and motivated to move forward on collective goals.

Three Day Board Retreat

"It's easier to fix an organization that's having massive problems. It's harder to improve an organization that is performing well already," says Cheryl. "We are a highly-functioning group, very successful; Kristi was able to see this and work with the group to get results."

An important part of the retreat was the small group discussion sessions. These gave the Board members an environment in which they were able to relax and discuss the issues openly.

As intended, participants came out of the group discussions pinpointing different areas of focus for the organization. "Kind of classic strategic planning, but KLR's facilitation really enabled us to get solid, actionable results."

Kristi was also able to make changes during the retreat to ensure a successful outcome. She and Cheryl noted after the first day that the members were more engaged and productive in the smaller groups, so Kristi changed the format for the next day to keep that productive flow going. "I applaud Kristi for being so flexible and nimble, and adjusting on the fly." says Cheryl. "Being willing to change the plan, change her facilitation in the moment, really helped us get results."

Facilitating with CEOs

Cheryl points out that Kristi is a strong facilitator, with an air of authority in the room. She says, "That's really important with C-suite executives. Right off the bat Kristi established credibility and authority."

Cheryl continues, "Kristi was truly a facilitator - she was there to help The Council Board get their voices heard, and get what they needed from the retreat. She talked just enough to make sure that everyone understood why we were there and what we were doing. Then she stepped back and let the action happen."

Clarity, Enthusiasm & Solid, Actionable Results

The retreat has given The Council staff greater clarity about how the Board feels about their offerings, and what is truly important to them as members. Everyone on The Council's executive team is now thinking and looking in one direction "That is a huge feat!" says Cheryl, "Strategic planning is an ongoing process, and the staff is now more energized, excited, and focused about how what we are doing fits into the overarching goals and priorities. Big-picture thinking."

Kristi continues to follow up with The Council to ensure lasting results. She has also continued to coach and support Cheryl.

"Kristi is a dynamo, just an exceptional facilitator and a truly nice person. She was great for The Council, and for me personally."

" We have a large board, which Kristi handled beautifully. It's hard to do what she did with fifty-plus people! Kristi is a strong facilitator, with an air of authority in the room, which is really important with C-suite executives."

*~Cheryl Matochik, Vice President
of Strategic Resources, The
Council*

To learn more about KLR Consulting, visit our website www.klrconsulting.com