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with Gregg Calestini, President/CEO, InStrategy*

It's All About Results.

We recently spoke to **Gregg Calestini**, President/CEO of **InStrategy** Group, an insurance consultancy firm that focuses on mid-size companies. InStrategy provides expertise and insight to carriers, retail agents, brokers, wholesalers, MGAs and third-party administrators. With a keen focus on management coaching, brand enhancement, marketing, sales training and communications, InStrategy works with organizations cognizant they need change and who are looking for measurable results.

Gregg founded the firm in 2008 after 25 years of extensive experience in the insurance industry starting from the trenches all the way up to the boardroom. As an executive, manager, underwriter, salesman, marketer, including co-founding American Wholesale Insurance Group (AmWINS) and Mercator Risk Services, he has seen many of the challenges business leaders face today and knows what works and what doesn't.

"Some folks questioned my decision to go into the consultancy business when the economy was just beginning to contract," said Gregg. "But it's the perfect time to do so. Now isn't the time for organizations to bring in high-priced talent for corporate roles such as those in marketing and sales management. With InStrategy, you work with seasoned veterans who have built companies from ground up. We have people from all areas of the insurance space who have worked for – or have been instrumental in – successful firms, from start-ups that have grown and blossomed to Fortune 500



InStrategy President/CEO Gregg Calestini spoke to Annie George, Editor of ProgramBusiness.com, about the challenges the insurance industry faces today, and how to move forward to start driving results again.



companies. What we bring to our clients is a true understanding of what it takes to run their business in today's hyper competitive environment. We understand their pain, challenges and issues. Our single goal is to make a difference and restore sustainable growth.

“What InStrategy does best is help get organizations back to basics in driving business results. We are not about adding another layer of bureaucracy or issuing documents filled with case studies and off-the-shelf recommendations. We really become part of the organization and get to know our clients. We look at our clients from various angles – from leadership and business strategy development to operational efficiencies and sales marketing. We talk to them about what they're trying to accomplish and how they're going about executing and measuring their plan. Typically, what we find is that each organization has a good group of people and solid platforms. Their greatest challenge usually involves one or more of the following areas:

- the **rigor** and **discipline** on where to focus sales time and energy
- articulating the company's **value proposition** so they can de-commoditize their products and services
- defining their goals and **executing** on those goals
- measuring progress and **results**
- having and training the **right people**

“Most of our clients are good at running their business but may need help in moving forward strategically. They need an extra set of eyes – people who are standing 5,000 above the day to day to help them think through issues, understand how to run their business more efficiently, or effectively engage their people and clients.

On focus ...

“We've been on the soft side of the market since 2004 and in the mist of probably one of the most daunting economic times we've experienced both as individuals and as businesses. Many

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businesses and their exposure base have been both vertically and horizontally challenged. An organization needs to determine how to grow within these parameters and where they will spend their resources. We spend time with our clients looking back at the DNA of a business when things were going well, then we look at their core focus today. By looking at what you did, how you did it, and then contrasting this with what is being done today, you can see where some of the challenges lie," said Gregg.

"For example, many organizations have experienced significant revenue loss because their core businesses were in markets that have been devastated by the economy (real estate, construction). We'll ask them to step back and look at emerging sectors and geographic territories, and determine if any of those industries are in sectors in which they have historically built their reputation. Is there a way to create new products or a new focus inside those industry sectors that can better help meet those customer needs? Is there an opportunity for geographic expansion, of getting out of your Zip code? It's about leveraging what you know well, your intellectual capital, which will differ from one organization to another," he continued.

On behaviors...

InStrategy will also examine an

organization's marketing tenets or Best Practice. They'll look at behaviors and techniques the organization may have adopted because of the economy in the way it markets, and defines and communicates its value proposition to customers. "Sometimes, the front line sales team may need additional training," said Gregg. "Or, sometimes what is required is creating a more collaborative sales culture and marketing initiative. Analyze the market and whom you are targeting, then always refine the message for that specific audience. Not only do you get more focused on the products and services you're selling, but you train and refine the skill sets of your sales and support staff so that they deliver on the promise to clients. From CSRs to account managers and producers, everyone must understand how they connect to business results and that what they do is key to growth," said Gregg.

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On making hard choices ...

"It's a challenging time for our industry," said Gregg. "We are struggling to de-commoditize what we offer. The caliber of salesperson you had during the hard market and better economic times may not necessarily be what an organization needs today. Sometimes you need to retrain salespeople. Sometimes, you need new DNA to get the business back to growth. But management is often reluctant to let people go. It's about taking an honest look. Given how our market and business has evolved, sometimes we have the wrong people in the wrong roles. Take an objective view and gain an understanding of what and who is working. We'll help organizations take a look at their culture, the people, what they're doing their accountabilities, and measure outcomes," said Gregg.

InStrategy's Promise...

It's all about the client's profits and focusing on top and bottom line activities around the desired outcomes. "Our commitment is that we leave our clients in a much better position than we found them," said Gregg. "I'll meet with a client and discuss their needs and begin to set things in motion. If during the pre-engagement process, we determine we cannot add value, we'll take a pass. If the needs involve a core competency we don't possess, we will attempt to access our partner network or other parties and bring them into the engagement. Our model is

based on bringing the most appropriate resource to the table. We make a commitment to deliver and do things well. Unlike other consulting firms who would like prolonged engagements, over time, InStrategy looks to get fired because it means we've accomplished our goals and we are no longer needed. " As their tagline says, 'We leave as a result.'

For more information about InStrategy, please visit the company website at:
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