

Agency Management

Consultants

KAIA offers this list of leading agency consultants across the nation. Websites are linked from firm names where available. For further information about these or other consultants, contact KAIA. You can also find consultants through the American Association of Insurance Management Consultants at www.aaimco.com.

Suggestions for making the most out of working with consultants:

1. Understand your need as much as possible and what you hope to accomplish from outside expertise.
2. Screen the consultant to validate expertise:
 - a. Ask for written summaries of relevant client assignments completed.
 - b. Ask for multiple references who can confirm the consultant met objectives.
 - c. If you are going to get bids, start with a Request for Qualifications (RFQ).
3. Be prepared to help the consultant get to know your organization.
4. Get a written proposal. If you're taking bids, prepare a Request for Proposal (RFP).
5. Understand the fee structure including expense reimbursement and payment schedule. Have payment schedule tied to interim benchmarks so you can evaluate the program. Ask for a satisfaction guarantee.
6. Get a written contract or letter of agreement that identifies consultant's deliverables, role in implementation; if any, and criteria for interim benchmarks. Include non-disclosure and non-compete language. Make sure you understand your obligations for successful implementation.

Consultant	Website	Specialization
Agency Management Resource Group	www.agencyconsulting.com	Management, Sales, Workflow, Technology
Business Management Group	www.bmgconsulting.com	Management, Sales, Technology, M&A
FIRM Consulting	www.ficklinginc.com/	Management, Sales, M&A
Fries & Fries	www.jackfries.com	Management, Sales, Technology
Manhattan Group	www.tmgny.com	M&A, Planning, Valuations, Legal
Marsh Berry	www.marshberry.com	Management, Sales, Technology, M&A
Nettles Consulting	www.nettlesconsulting.com	Workflow, Technology
Oak & Associates	www.oakandassociates.com	Management, Sales, Technology, M&A
Optimum Performance Solutions	www.optperform.com	Management, Sales, Technology, M&A
Professional Service Associates, LLC	http://www.psaservice.com/about_us.html	Management, Sales, Technology
Reagan Consulting	www.reaganconsulting.com	Management, Sales, Technology, M&A
Steve Anderson	www.steveanderson.com	Technology
Wedge Group	www.thewedge.net	Sales