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ReaganView

Building an Exceptional Organization

To our friends and clients,

As the authors of the IIABA / Reagan Consulting [Best Practices Study](#), we are frequently asked what the right metrics are to focus on when striving to become an exceptional organization. Here's a better question: What is the single best practice that will help our organization to become exceptional? It turns out there is a right answer to this question.

The single best business practice is the discipline of strategic planning, a process whereby an organization's best thinkers meet regularly to consider three fundamental questions:

- 1. Where are we now?**
- 2. Where do we want to go?**
- 3. How do we get there?**

When we see organizations transformed, the common denominator is a rigorous commitment to the discipline of strategic planning. We have developed an effective planning process that can be completed over a couple days with a Reagan Consulting facilitator. Let us know if we can help your organization develop this most important best practice.

Tom Doran
Partner/Reagan Consulting



on issues and opportunities relevant to the insurance distribution system

**This document includes only general information and should not be relied upon as legal, tax or compliance advice.*

Congratulations to the firms we had the honor of representing in late 2018

Reagan Securities served as financial advisor to	Reagan Securities served as financial advisor to	Reagan Consulting served as financial advisor to	Reagan Consulting served as financial advisor to	Reagan Consulting served as financial advisor to
Tyler Insurance Agency  El Cerrito, CA	Wellington Associates  Boston, MA	Eustis Insurance & Benefits  Middletown, CT	Rodman Insurance Agency, Inc.  Zoocham, MA	R.T. Beers & Co. Ins. Services  Long Beach, CA
In its sale to	In its sale to	In its sale to	In its sale to	In its sale to
Arthur J. Gallagher & Co.  2018	Arthur J. Gallagher  2018	Marsh & McLennan Agency  2018	Brown & Brown Insurance  2018	Arthur J. Gallagher & Co.  2018

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Congratulations to the firms we had the honor of representing in M&A transactions that closed late in 2018.

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