

ORANGE *leaf* CONSULTING





TITLE INSURANCE CONSULTANTS

Bringing the Pieces Together

Working "In" vs. Working "On" Your Business...

4 Ideas to Move Your Agency Forward





What does it mean to be working *in* your business?

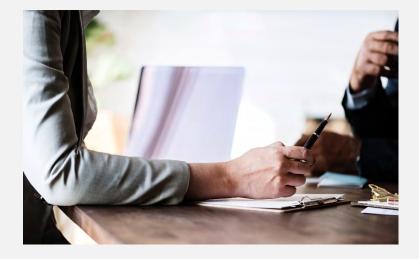
- You perform everyday tasks necessary to keep the business running
 - Title searches/exams
 - Closing set up
 - Conducting closings
 - Managing employees





What does it mean to be working <u>on</u> your business?

- You are focusing on these issues (instead of day-to-day issues)
 - Improving the flow of work in your office
 - Improving the quality of your products and services
 - Expanding your business
 - Developing responses for strategic challenges and opportunities



• Exit strategy



Why you should work <u>on</u> your business?

- Better able to handle predictable problems
 - Employee turnover
 - Increased/New competition
 - Ownership/Brand changes
- Better able to handle unpredictable problems
 - Cyberfraud
 - Business interruption due to external causes
 - Regulatory changes
- Better able to maintain value of agency as investment or retirement asset



4 Ideas to Move Your Agency Forward

Metrics
 Operations
 Technology
 Sales





Metrics

To get where you are going, you need to know where you are now

6 basic things to measure month-by-month for the full year

- Open orders
- Closed orders
- Number of employees
- Revenue = title premiums and closing fees
- Total expenses
- **Profit = gross revenue minus expenses**





Metrics

- Measure your results each month
- Compare against goals
- Adjust your operations and sales efforts accordingly







Metrics



- Observe, Compare, & Adjust
- Charting makes it easier to spot trends more quickly

Total number of employees 4 4 5 6 6 7 7 6 6 5 4 4 64 Open orders (policies, not searches) 24 20 23 30 34 25 45 34 36 29 19 16 335 Closed orders (policies paid for) 20 18 22 25 30 32 38 26 24 20 19 17 291 Total title and closing revenue \$ 28,926 \$ 32,151 \$ 30,742 \$ 34,932 \$ 23,342 \$ 41,664 \$ 51,219 \$ 30,931 \$ 41,409 \$ 29,608 \$ 407,321 Total title and closing revenue \$ 32,504 \$ 31,698 \$ 33,766 \$ 33,315 \$ 32,200 \$ 32,682 \$ 31,588 \$ 32,909 \$ 390,966 \$ 32,417 \$ 32,200 \$ 32,682 \$ 31,588 \$ 33,909 \$ 390,966	A		B	1	C		D		E		F		G		н		1	J		ĸ		1		M		N	
tem/Category Total number of employees (24) Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Total Open orders (policies, not search of Dicade orders (policies, not search of Closed orders (policies, not search of Dicade orders (policies, not search of 20 18 22 22 38 26 24 20 19 17 291 Total title and closing revenes (5 5 32/504 5 31/508 5 32/618 5 33/61 5 32/618 5 33/608 5 33/761 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 31/508 5 32/618 5 <											_																
Tatal number of employees 4 4 5 6 6 7 7 6 6 5 4 4 64 Open orders (policies, not searching revenue) 22 22 30 34 25 44 64 56 29 19 17 231 Total title and closing revenue 5 28.205 5 32.151 6 30.742 5 32.8375 5 22.241 5 34 36 29 19 17 231 Total title and closing revenue 5 28.262 5 32.616 5 32.421 5 32.622 5 33.168 5 32.926 5 33.168 5 32.926 5 33.996 5 33.996 5 30.966 5 30.396 5 30.966 5 4 4 4 4 5 5 44 4 4 5 5 5 5 32.417 5 32.662 5 33.990 5 33.990 5 30.966 5 4 4 4 4		Gray	cells =	Auto	omatically	com	puted	-																			
Open orders (policies, not searches) 24 20 23 30 34 25 45 34 36 29 19 16 335 Closed orders (policies, not searches) 22 25 30 32 28 26 24 20 19 17 291 Total title and closing revenue \$ \$ 28.926 \$ \$ 31.761 \$ \$ 33.768 \$ \$ 23.9287 \$ \$ 31.864 \$ \$ 51.219 \$ \$ 30.931 \$ \$ 44.09 \$ \$ 296.08 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 30.931 \$ \$ 40.931 \$ \$ 40.931 \$ \$ 40.931 \$ \$ 40.931 \$ \$ 40.931 \$ \$ 40.931 \$ \$ 50.221 \$ \$ 50.921 \$	Item/Category		Jan		Feb		Mar	-	Apr		May	J	une		July		Aug	Sept		Oct		Nov		Dec	1	fotal	
Closed orders (poticies paid for Total streames) 20 18 22 28 30 32 38 26 24 20 19 17 291 Total streames 5 28 5 25 15 30.765 5 23.253 5 32.267 5 29.51 5 30.91 5 32.908 5 32.908 5 32.908 5 32.908 5 32.908 5 32.908 5 32.908 5 32.908 5 32.908 5 32.908 5 32.909 5 6577 5 6577 5 6577 5 6577 5 6577 5 64.4 5 10.77 6 0 5.8 4.8 4.0 5.2 2.2 5 10.57 5 6.4 5.7 6.0 5.8 4.8 4.0 5.2 2.2 5.0 4.6 5.4 4.4 4.0 5.2 5.0 4.6 5.4 5.2 5.553 5.9 8.337 5.375 4.922 5.061 5.07 5.0 4.6 5.27 </td <td>Total number of employees</td> <td></td> <td>4</td> <td></td> <td>4</td> <td></td> <td>5</td> <td></td> <td>6</td> <td></td> <td>6</td> <td>1</td> <td>7</td> <td></td> <td>7</td> <td>1</td> <td>6</td> <td></td> <td>6</td> <td>5</td> <td></td> <td>4</td> <td></td> <td>4</td> <td>-</td> <td>64</td> <td></td>	Total number of employees		4		4		5		6		6	1	7		7	1	6		6	5		4		4	-	64	
Total title and closing revenue Total title and closing revenue S 5 28,292 5 30,742 5 30,742 5 20,307 5 30,331 5 41,409 5 29,608 5 30,331 5 41,409 5 29,608 5 30,331 5 41,409 5 29,608 5 30,331 5 41,409 5 29,608 5 30,331 5 41,409 5 20,331 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 30,391 5 40,31 5 40,31 40,318 40,318 40	Open orders (policies, not searches)		24		20		23	I	30		34	1	25		45	1	34		6	29		19		16		335	
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	Closed orders (policies paid for)		20		18		22	1	25		30		32		- 38		26	1	4	20		19		17	100	291	
Profit \$ (3,578) \$ 752 \$ (956) \$ 1.164 \$ (9181) \$ 9.247 \$ 19.019 \$ (3,152) \$ (657) \$ 8.446 \$ (4.301) \$ 16.355 Analysis Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Total Closed orders per employee 5.0 4.6 5.7 3.6 6.4 5.7 6.0 5.8 4.8 4.0 5.2 5.2 5.37 4.03 4.04 4.03 4.3 4.3 4.3 4.3 5.2 5.37 4.48 4.3 4.3 5.2 5.37 5.447 5.37 5.447 5.37 5.47 5.37 5.47 5.37 5.47 5.37 5.47 5.37 5.47 5.37 5.47 5.37 5.47 5.37 5.47 5.37 5.37 5.37 5.37 5.37 <t< td=""><td>Total title and closing revenue</td><td>S</td><td>28,926</td><td>S</td><td>32,151</td><td>S</td><td>30,742</td><td>S</td><td>34,932</td><td>S</td><td>32,867</td><td>\$</td><td>23,342</td><td>S</td><td>41,664</td><td>S</td><td>51,219</td><td>\$ 29,53</td><td>0 5</td><td>30,931</td><td>S</td><td>41,409</td><td>S</td><td>29,608</td><td>\$ 4</td><td>07,321</td><td></td></t<>	Total title and closing revenue	S	28,926	S	32,151	S	30,742	S	34,932	S	32,867	\$	23,342	S	41,664	S	51,219	\$ 29,53	0 5	30,931	S	41,409	S	29,608	\$ 4	07,321	
Analysis Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Total Closed orders per employee 5.0 4.5 4.4 4.2 5.0 4.6 5.4 4.3 4.0 4.3 4.0 4.3 4.0 4.3 4.0 4.3 4.0 4.4 4.2 5.0 4.5.4 4.4 4.2 5.0 4.6 5.4 4.3 4.0 4.0 4.0 4.8 4.3 5.824 5.834 5.952 5.637 5.4.98 5.837 5.952 5.637 5.618 5.834 5.834 5.364 5.834 5.3624 5.834 5.3625 5.7103 5.6185 5.952 5.637 5.4.478 5.6188 5.82418 5.82418 5.82418 5.82418 5.82418 5.82418 5.8256 5.2556 5.6131 5.2556 5.6131 5.255 5.7132 5.1331 5.2112 5.10352 5.2112 5.10352 5.2112 5.102	Total expenses	S									33,315	\$		-	32,417	S					S		s	33,909	\$ 3	390,966	
Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Total Open orders per employee 6.0 5.0 4.5 5.0 4.6 5.0 4.6 5.7 6.0 5.8 4.8 4.0 4.5 Average tremployee 5.0 7.232 5 8.038 5 5.622 5 6.478 5 5.647 5 4.65 5.447 5 5.478 5 6.318 5 6.318 5 6.318 5 6.318 5 6.318 5 6.318 5 6.193 1.0352 5 7.402 5 6.193 1.0352 5 7.402 5 6.193 1.0352 5 6.193 1.0352 5 7.402 5 6.193 1.0352 5 6.193 1.0352 5 6.193 1.0352 5 6.193 1.0352 5 6.193 1.0352 5 6.193 1.0352	Profit	5	(3,578	S	752	\$	(956)	\$	1,164	\$	(448)	5	(9,181)	\$	9,247	\$	19,019	\$ (3,15	2) \$	(657)	5	8,446	5	(4,301)	5	16,355	
Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Total Open orders per employee 6.0 5.0 4.5 5.0 4.6 5.0 4.6 5.7 6.0 5.8 4.8 4.0 4.5 Average tremployee 5.0 7.232 5 8.038 5 5.622 5 6.478 5 5.647 5 4.65 5.447 5 5.478 5 6.318 5 6.318 5 6.318 5 6.318 5 6.318 5 6.318 5 6.193 1.0352 5 7.402 5 6.193 1.0352 5 7.402 5 6.193 1.0352 5 6.193 1.0352 5 7.402 5 6.193 1.0352 5 6.193 1.0352 5 6.193 1.0352 5 6.193 1.0352 5 6.193 1.0352 5 6.193 1.0352																											
Open orders per employee 6.0 5.0 4.6 5.7 3.6 6.4 5.7 6.0 5.8 4.8 4.0 5.2 Closed orders per employee 5.0 4.5 6.44 4.2 5.0 4.6 5.4 4.3 4.0 4.3 4.0 5.2 5.47 5.47 5.43 5.95 5.83 5.952 5.837 5.422 5.6186 5.035 5.461 5.537 5.4527 5.638 5.563 5.464 5.367 5.4312 5.387 5.4322 5.6186 5.1032 5.742 5.638 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.567 5.688 5.221 5.567 5.567 5.688 5.223 5.256 5.59 5.688 5.231 5.527 5.567 5.567 5.688	Analysis																										
Closed orders per employee Average remoloyee Average expense per employee S 126 \$ 7,232 \$ 8,038 \$ 6,148 \$ 5,528 \$ 5,478 \$ 3,333 \$ 5,962 \$ 8,537 \$ 5,44.0 \$ 4.0 \$ 4.8 \$ 4.3 \$ 4.5 \$ 4.922 \$ 6,186 \$ 5,018 \$ 8,241 \$ 8,477 \$ 6,109 \$ 4.92 \$ 6,186 \$ 10,552 \$ 7,240 \$ 5,6344 \$ 6,544 \$ 4.3 \$ 4.5 \$ 7,250 \$ 5,141 \$ 8,247 \$ 5,618 \$ 8,241 \$ 8,477 \$ 6,109 \$ 4.92 \$ 6,186 \$ 4,615 \$ 4,522 \$ 5,618 \$ 5,028 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,528 \$ 5,52								11		_		J				1					_				1		
Average tremus per employee Average expense per employee S 8 126 \$ 7,232 \$ 8,038 \$ 6,148 \$ 5,622 \$ 5,6478 \$ 3,335 \$ 5,952 \$ 8,637 \$ 5,442 \$ 6,318 \$ 8,024 \$ 5,367 \$ 6,103 \$ 2 8,024 \$ 6,109 \$ 6,109 \$ 4,075 \$ 5,533 \$ 6,109 \$ 5,553 \$ 6,454 \$ 5,563 \$ 5,563 \$ 5,447 \$ 5,367 \$ 5,447 \$ 5,370 \$ 5,447 \$ 5,370 \$ 5,447 \$ 5,370 \$ 5,447 \$ 5,121 \$ 5,1075 \$ 2,255 \$ 4,472 \$ 5,370 \$ 5,447 \$ 5,121 \$ 5,1075 \$ 2,255 \$ 4,472 \$ 5,370 \$ 5,243 \$ 5,377 \$ 5,447 \$ 5,121 \$ 5,1075 \$ 2,255 \$ 5,533 \$ 6,109 \$ 2,05 \$ 5,533 \$ 5,367 \$ 5,247 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,241 \$ 5,370 \$ 5,255 \$ 5,253 \$ 5,255 \$ 5,253 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,255 \$ 5,25																							_				1
Average expense per employee \$ 8 126 \$ 7.850 \$ 6.340 \$ 5.622 \$ 5.633 \$ 4.646 \$ 5.367 \$ 5.447 \$ 6.318 \$ 8.421 \$ 8.477 \$ 6.109 Average profit per employee \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$						1		14 1						-		1							_		_		
Average profit per employee S (188) S (191) S 194 S (75) S (1,312) S 3,170 S (525) S (131) S 2,112 S (1,075) S 2266 Average profit per open order S (149) S 38 S (42) S 39 S (131) S 2(31) S 2(41) S 2(41) S 2(41) S 2(41) S 2(41) S 2(17) S 2(17) S 2(17) S 2(17) S 2(17) S 2(11) S 2(11) S 2(11) S <t< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>5</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>								5																			
Average profit per open order S (149) S 38 S (42) S 39 S (13) S (367) S 205 S 559 S (131) S (287) S 205 S 559 S (131) S (287) S 205 S 559 S (131) S (287) S 243 S 732 S (131) S (283) S 445 S (253) S 56 S (131) S (131) S (131) S (131) S (131) S (131) S (145) S (253) S 56 S (131)																											
Average profit per closed order \$ (179) \$ 42 \$ (43) \$ 415) \$ (287) \$ 243 \$ 732 \$ (131) \$ (33) \$ 445 \$ (253) \$ 56 Graphs Files per Employee Profit per Order 7.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0 5.0														_													
Graphs Files per Employee 7.0 5.0 4.0 3.0 2.0 1.0 Jan Feb Mar Apr May June July Aug Sept Dct Nov Dec																											
Files per Employee Files	Average profit per closed order	5	(179	\$	42	5	(43)	5	47	\$	(15)	\$	(287)	\$	243	\$	732	\$ (13	1) \$	(33	1 \$	445	\$	(253)	5	56	
Files per Employee Files																											
Files per Employee Files																											
7.0 5.0 5.0 6.0 8.0 7.0 5.0 8.0 9.0 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 10 <t< td=""><td>Graphs</td><td></td><td></td><td></td><td></td><td>1</td><td>Filos nor</td><td>Em</td><td>nloves</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>rof</td><td>it per Or</td><td>der</td><td></td><td></td><td></td><td></td><td></td><td></td></t<>	Graphs					1	Filos nor	Em	nloves										rof	it per Or	der						
7.0 5.0 4.0 3.0 2.0 1.0 Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec							nes per	LIII	picyce											reper or	9.01						
50 50 40 30 20 10 Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec															\$800												
5.0 5.0 4.0 3.0 2.0 1.0 Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec		- 7	0,												5600							1.					
5.0 4.0 3.0 2.0 1.0 Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec		- 2							~						Union						,	A.					
4.0 3.0 2.0 1.0 Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec				~			1		-	-	-	-			5400	0					1	1		A			
4.0 3.0 2.0 1.0 Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec		5	0	-2		_	1-1-	1	-			~			F-100						1	· •					
2.0 Jan Feb Mar Apr May June July Aug Sat Oct Nov Dec Jan Feb Mar Apr May June July Aug Sat Oct Nov Dec		- 4	.0				1		-	-		-	-		\$200									/			
2.0 1.0 Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec		1.4	0					*							5-		~	-	-	1			1				
1.0 Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec S(600)		_															Jag Feb	Mar Apr	Ma	June Ji	dy i	Aug Sat	Da	Nov	Dec.		
Jan Feb Mar Apr Miay June July Aug Sept Oct Nov Dec 5(600)		- 4	.0												\$(2.00	2				11				-	1		
Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec 5(600)		1	0												cuino					V							
															2(400	/											
Open orders per employee			Jar	E F	Feb Mar	Apr	May J	une	July Au	e :	Sept Oct	Nov	Dec		S(600)											
Open orders per employee - Closed orders per employee - Average profit per open order - Average profit per closed order							internal second											and the second				to mail.					
			-	-	Open orde	rs pe	r employee		- Clos	sed o	orders per er	mploye	e			-	Average	profit per of	ien or	der 🗕 -	Av	verage profit p	er cl	osed order			



Operations

businessdictionary.com defines Operations as: The transformation of resource or data inputs into desired goods, services, or results, and create and deliver value to the customers.

Two or more connected **operations** constitute a process....





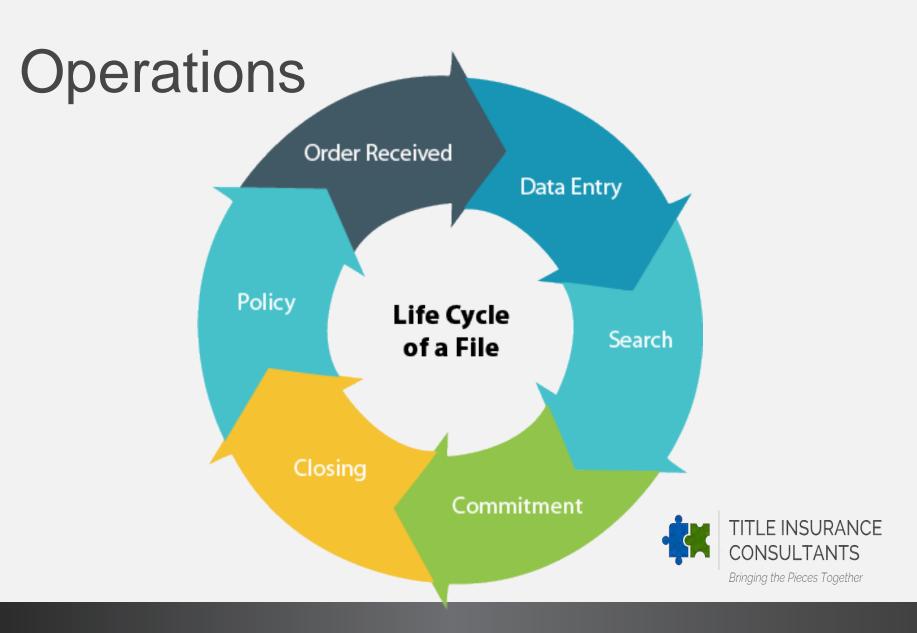
Operations

- What is actually happening with your front-line employees vs what you think is happening?
- How many times is a file being "touched"?
- How "paperless" is your process, honestly?











Technology

Technology helps optimize performance to increase efficiency. Your production software can make life easier or harder. Are you using its capabilities to the fullest?







Technology

- When did you last evaluate your system, and does it even mirror what's happening on the floor?
- Does it give you the information that you need?
- Can it help you become paperless?







Technology







- Get everyone on your team involved
- Who is primarily responsible for sales?
- What makes them successful?
- How do you track it?
- What roles do your other team members play?







- Get over the "ick factor"
- You've been selling all your life!
- Set specific goals for each role
- Help them find their words
- Play to their strengths







- Establish your growth goals
- Define your strategies and tactics for success
- Remember the 6 R's:
 - RETAIN
 - RENEW
 - REFER
 - REVIVE
 - RECRUIT
 - REAL CUSTOMER







- ASK for the business!
- Know WHEN to ask
- Know HOW to ask
- Remember:

Every call is a SALES call!







Call to Action

- Implement 1 of the 4 ideas you've seen today
- After you see the resultant guaranteed improvement, implement another of the ideas!







Thank You!

Metrics

Ethan Powsner ethan.powsner@fnf.com 616.302.3121

Technology

Brie McDaniel brie@titleinsuranceconsultants.com 301-908-2252

Operations

Kay Underwood kay@titleinsuranceconsultants.com 970-381-4881 Sales Cindy McGovern <u>cmcgovern@orangeleafconsulting.com</u> 415.277.5901