



The Anderson Succession Index™

Anderson Sabourin Consulting Inc. (ASCI) is a full service provider of succession planning professional services for direct and independent agents. Our phased approach to the myriad issues intrinsic to any succession plan recognizes that every transition is unique and is dependant on managing the specific behavioral elements (the dynamics) of the successee/successor(s)/other stakeholders and the business elements (the mechanics) of the transition.

Succession Planning

ASCI has worked with many insurance entrepreneurs to assist in their succession, whether it be early on in the process where a suitable successor has not been found or later when we help the stakeholders to process work through the sales, relationship and management issues that arise in every succession.

The three phases of our Transition Coaching practice has become recognized as leading edge and innovative in the industry.

Keeping in mind that successions are like snowflakes and fingerprints, always very unique, a typical ASCI succession planning engagement includes:

Phase 1: Assessing Successor(s) using the Anderson Succession Index™

Using the highly valid and reliable *Anderson Succession Index™*, we evaluate both the successee and the potential successor(s) using a battery of psychometric and behavioral inventories to determine a Probability Factor of Successful Succession (PFSS™). These instruments were specially designed based on our years of in depth research and practical application with insurance agencies across the USA.

Once a PFSS is determined, we co-develop a plan with our clients to increase the probability of success, whether it is behavioral/dynamics based or business/mechanics based. Our *Steps to Success Roadmap* identifies key development tasks with timelines to ensure that all stakeholders are on the “same page” during their journey towards successful succession.

One of our strategic partners offers match making services if a client wants to find a suitable successor.



Phase 2: Transition Coaching

Based on our in-depth assessment, we provide regular and ongoing coaching for the successee, successor(s) and other key stakeholders to facilitate their journey. Since the goals and objectives of the stakeholders in each succession are highly individual, this important work is critical to a smooth and effective transition.

Phase 2 includes, but is not limited to:

- Management roles and responsibilities including key staff management
- Client relationship transition and Customer Relationship Management (CRM)
- On going issues management
- Business development and growth (sales, retention and growth coaching)

Another of our strategic partners can assist our clients in practice valuation and capital financing options.

Phase 3: Implementing and Evaluating

Within the dozens of family and non-family insurance practices with whom we have consulted, they all have one thing in common: the need to objectively evaluate “how they are doing?” We offer a simple framework based on Phase 1 and 2 to allow for the inevitable mid course corrections inherent to every succession plan.