

# TRUENORTH ACHIEVES GROWTH TARGETS THROUGH PANDEMIC WITH OPTIMIZED SALES PROCESS

## ABOUT THE COMPANY

TrueNorth is a retail broker on a rapid growth trajectory driven by specialization in niche areas with complex risk, including construction and telecommunications. For over 20 years, TrueNorth has met clients' needs by providing innovative risk strategies that protect and maximize assets, resources, and opportunities.

## THE CHALLENGE

While the insurance industry becomes increasingly commoditized, TrueNorth has differentiated itself through a consultative approach. In their continued efforts to improve the sales process, TrueNorth leaders identified an opportunity to foster a culture of customer centricity across departments.

Specifically, they sought to deepen team members' understanding—from young producers to account managers to placers—of the downstream impact of each interaction with customers.

## THE SOLUTION

TrueNorth partnered with ReSource Pro's Agency Growth Solutions team to create a new strategy. First, the broker's sales team documented their entire sales process from start to finish, from the first point of research, to the first meeting, and finally the sale.

"Our producers have to feel confident about their ability to build trust with clients," said Aaron Brown, Principal, Construction Practice Leader at TrueNorth.

The sales team collaborated with Frank Pennachio, Practice Leader of Growth Solutions at ReSource Pro, to review each step of the sales process. This helped the producers develop a greater understanding of the downstream impact to the customer, identify opportunities to build trust, and deliver greater value.

## THE RESULTS

Applying the client-centered sales process, TrueNorth's producers have developed greater confidence in building trust with clients in a challenging market.

"In a pandemic and a remote virtual selling environment, we were rock solid in our process," Brown said. "That allowed us to grow in 2020."



## CUSTOMER PROFILE

Full-service property and casualty and employee benefits retail broker

## LOCATION

Headquartered in Midwest with locations nationwide

## BUSINESS NEED

Align producers and organization around a customer-first sales process

## SOLUTION

ReSource Pro Agency Growth Solutions

## THE IMPACT

- ~40% revenue growth in 2020
- Organization-wide buy-in to culture of customer centricity

With ReSource Pro's support, TrueNorth was able to:

- Give producers the "why" behind each step of the sales process, allowing them to create greater receptiveness among customers
- Empower departments outside of sales to optimize the customer experience for every client touch point
- Engage young producers to better understand the downstream impact to the customer of each step in the sales process

As a result, the company was able to navigate 2020's virtual selling environment with greater agility and achieve nearly 40% revenue growth.

### A SALES PROCESS THAT ELEVATES THE CUSTOMER EXPERIENCE

Following a sales process → Leading clients and building trust

Process-centric → Client-centric

Producer-led relationship → Whole organization aligned around customer

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**"IN A PANDEMIC AND A REMOTE VIRTUAL SELLING ENVIRONMENT, WE WERE ROCK SOLID IN OUR PROCESS. THAT ALLOWED US TO GROW IN 2020."**

AARON BROWN, PRINCIPAL,  
CONSTRUCTION PRACTICE LEADER,  
TRUENORTH

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### ABOUT RESOURCE PRO

ReSource Pro brings to the insurance industry tools, technology and strategic services that enable profitable growth through operations excellence. Headquartered in New York, ReSource Pro's global service centers address client operational needs around the clock. Recognized as an industry thought leader and listed as one of Inc. 500/5000 Fastest Growing Private Companies annually since 2009, the company is renowned for its focus on innovation, service excellence and trusted partnerships, and its unique productivity platform for insurance operations. Over 5,000 ReSource Pro employees provide dedicated support to hundreds of insurance organizations, consistently achieving a 97% client retention rate for over a decade.

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### FOR MORE INFORMATION

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