

INEX Capital & Growth Advisors

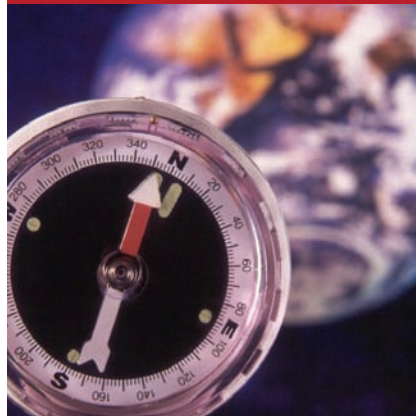
THE AGENCY OPTIMIZER PROCESS

A strategic planning process that optimizes the effectiveness of agency principals nationwide

“An adage of good customer service is to ‘always give the customer more than they expect to get’ which you’ve done. In fact, with your guidance we’re moving this agency through a critical crossroads with a plan that should carry us for at least another generation in our long history.”

*Paul J. Roy, CIC, CPCU • Principal
Elliot Whittier Hardy & Roy*

1. The Strategic Vision Session



“Your work on resolving a workable business plan in our financial services department was invaluable. In a short period of time, you resolved a bottleneck that had handcuffed negotiations for months.”

*David W. Griffin, CIC • Financial Services Department
James J. Dowd & Sons Insurance Agency*

2. The Obstacle Review



5. The Optimizer Process Review



4. The Agency Implementer



3. The Agency Optimizer Toolbox



“The technology you and your staff utilize enables maximum efficiency to the due diligence process itself, and the hard-copy product is comprehensive, well organized and catalogued.”

*Carol F. Krause • Vice President
Alliant Resources Group*