



Let's Elevate

 Leavitt Group

Your Sales Team

Leavitt Group's Sales Talent Acquisition Team works with you to build and elevate your sales team by recruiting top talent to drive your agency's growth and success.

OUTSIDE THE BOX

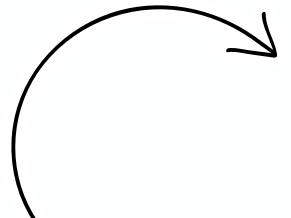
Recruiting Producers from a Variety of Industries

The insurance industry is often seen as a closed ecosystem, with many companies recruiting producers exclusively from within. However, this approach can limit your access to a wider pool of talented individuals who may have the skills and drive to succeed in sales.



Our team is skilled in full-scope recruiting, capable of identifying and placing talented sales professionals from outside the insurance industry, while also having the ability to place experienced producers already thriving within the industry. This ensures we consistently bring in professionals who can immediately contribute to and enhance our sales force.

Join us in exploring the pros and cons of recruiting outside the insurance industry and learn about our sales talent acquisition process.



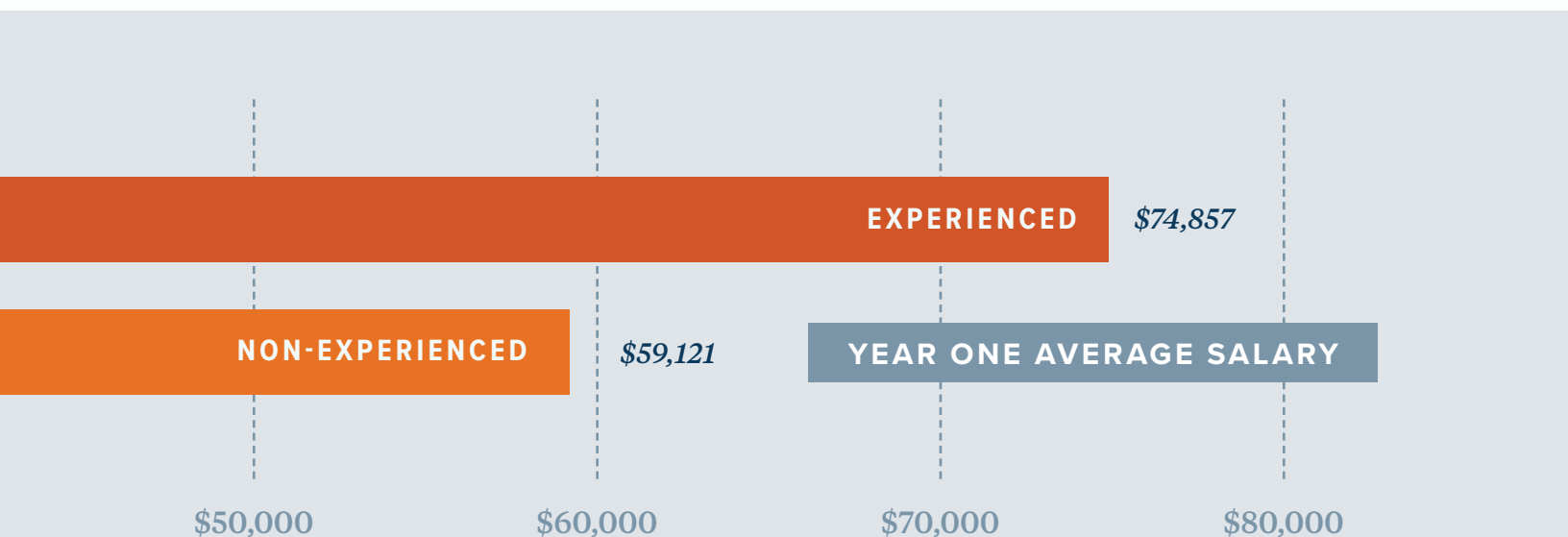
The Benefits of Looking Outside the Industry

- ▶ **Fresh Perspectives:** Individuals from other industries can bring new ideas and approaches to sales teams.
- ▶ **Diverse Skill Sets:** Non-industry professionals may have transferable skills that are valuable in sales, such as communication, problem-solving, and negotiation.
- ▶ **Strong Work Ethic:** Many individuals from outside the insurance industry are driven and motivated to succeed.
- ▶ **Higher Potential for Growth:** Individuals with less experience may be more eager to learn and sell, which can lead to greater success in the long run.
- ▶ **Homegrown Leaders:** We aim to cultivate future leaders aligned with Leavitt Group's culture and mission. (We want to avoid individuals inside of the insurance industry who hop from broker to broker.)
- ▶ **Lower Financial Investment Cost (salary/subsidy) / Higher ROI**

New-to-industry sales talent are filling critical leadership roles being vacated by the previous generation.

Since 2016, Sales Talent Acquisition producers with less than two years of insurance sales experience have made up 52% of our total hires.

We currently have seven active co-owners within Leavitt Group who came from outside the insurance industry, and a total of 12 co-owner perpetuation hires.



Recruiting Outside the Industry

The Challenges



TIME TO MENTOR

Adequate time commitment is required for effective mentoring while balancing one's own sales production and leadership assignments.



CONFIDENCE TO MENTOR

Mentoring can be intimidating due to the fear of not being able to guide mentees effectively or ensure their success.



STEEP LEARNING CURVE

Even the most talented salespeople can struggle to succeed if they fail to learn the complexities of the insurance industry.



FEAR OF LOST EFFORT

Investing significant time and resources in training a new producer carries the risk of them either failing to succeed or, worse, leaving for a competitor.

OUR SOLUTIONS

- ▶ Leavitt Group's Sales Leader Development Program provides training on how to build a successful sales team with resources on how to mentor producers, create a viable sales culture, how to run sales meetings, and more.
- ▶ We equip new producers with essential industry knowledge and effective sales practices through Producer School and the Producer Development Team.
- ▶ The Sales Force Development Group (SFDG) drives producer performance through personalized coaching, validation, competitions, and cutting-edge strategies that spark lasting growth.
- ▶ Our pre-screening assessments and interview processes help select candidates with suitable foundational skills, maximizing training effectiveness.
- ▶ We help engage producers in internal competitions and provide exclusive, cutting-edge tools that promote a culture of loyalty and growth.



KEY

Experienced: Producers who joined Leavitt Group with more than two years of insurance experience.

Non-Experienced: Producers who joined Leavitt Group with no prior insurance experience.

YEAR ONE AVERAGE REVENUE

EXPERIENCED

\$30,039

NON-EXPERIENCED

\$31,040

\$29,000

\$30,000

\$31,000

\$32,000

PERCENT EMPLOYED

EXPERIENCED

37.14%

NON-EXPERIENCED

44.16%

35%

40%

45%

50%

AVERAGE CURRENT BOOK SIZE

EXPERIENCED

\$138,060

NON-EXPERIENCED

\$174,024

\$130,000

\$145,000

\$160,000

\$175,000

Focusing on Sales Talent Over Years of Experience

While years of experience can be a valuable asset, it is not always the most important factor to consider when recruiting sales talent. Data shows that individuals with less than two years of experience can outperform those with more experience.

KEY COMPONENTS OF A SUCCESSFUL PRODUCER:



PERSONAL QUALITIES

They possess skills in connecting with and relating to others, have the drive to succeed, and live by Leavitt Group's governing principles.



SALES COMPETENCY

They have the ability to get in front of decision makers, champion a full sales cycle, and close deals.



TECHNICAL APTITUDE

They have the technical ability to learn a complex product and sales process.

The Leavitt Group Sales Talent Acquisition Process

The Sales Talent Acquisition Team is a group of sales professionals committed to finding high-caliber sales talent, regardless of industry experience. We follow a proven process to identify, assess, and recommend candidates who have the potential to succeed in our organization.

Let's get started!



Plan & Benchmark

We work closely with the agency partner (AP) and co-owner(s) to understand their specific goals for organic growth at their agency. Together, we develop a comprehensive job description that outlines the key responsibilities and qualifications for the new producer. Our well-defined plan achieves the following:

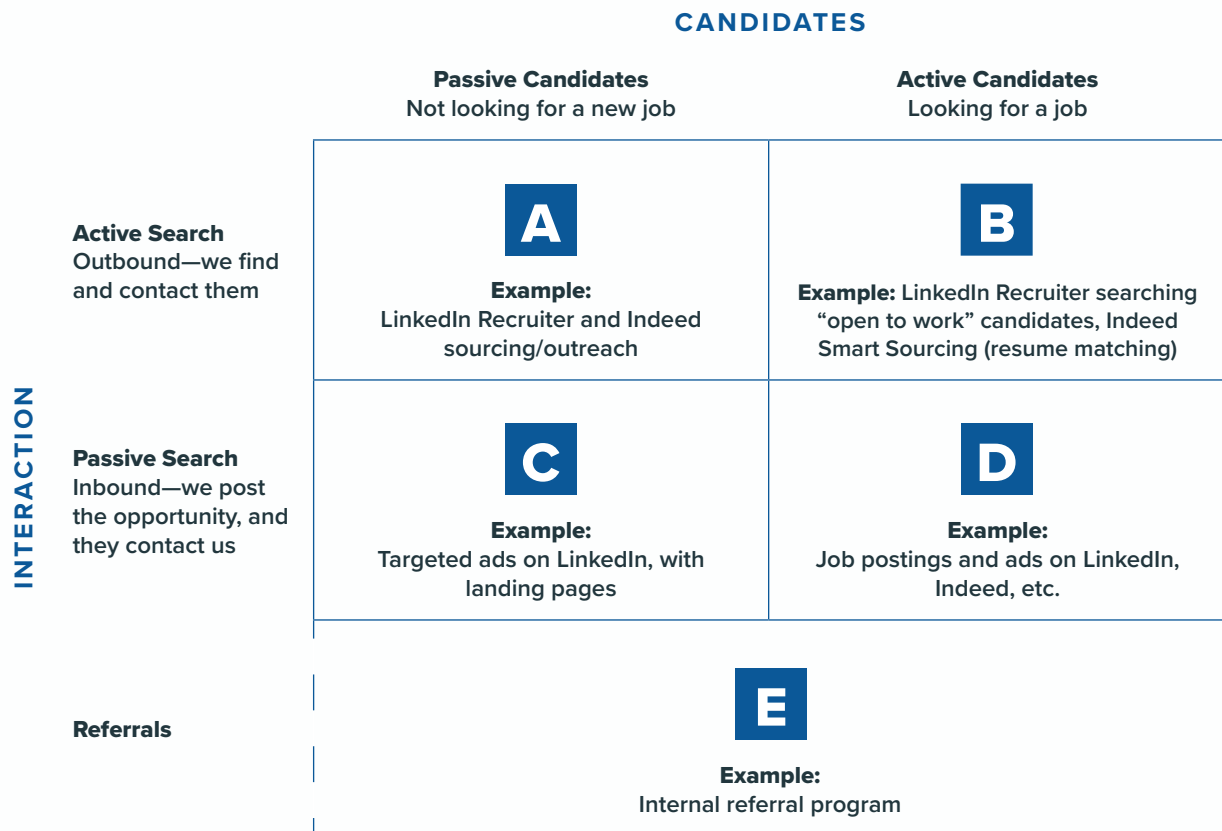
- ▶ Focuses the hiring process
- ▶ Creates a better candidate experience
- ▶ Reduces bias
- ▶ Bases hiring decisions on strengths, not minimal weaknesses

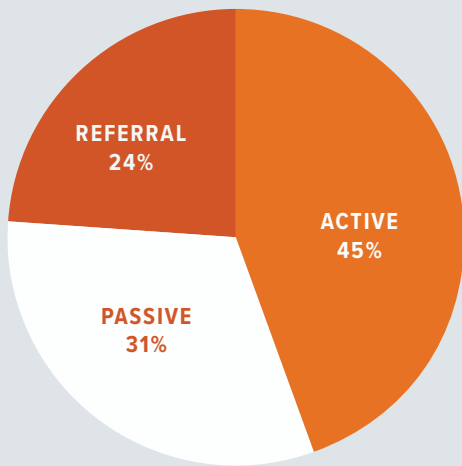
We benchmark the role against industry standards to ensure we are offering competitive compensation, commissions, and benefits.

Source & Attract

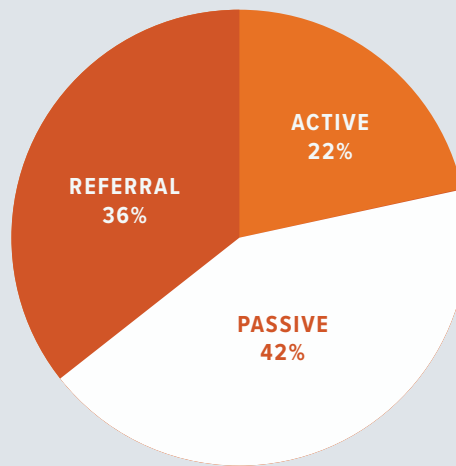
We use a variety of channels to source and attract top talent, including job boards, social media, and employee referrals:

- ▶ LinkedIn Enterprise Program
 - » Unlimited recruiter licenses
 - » Enhanced career page
 - » Life pages
 - » Unlimited sponsored job ads
 - » Marketing campaign with targeted traffic driver ads
- ▶ Indeed
 - » Sponsored job ads
 - » Resume sourcing database
- ▶ College job boards (agriculture, military, athletics)
- ▶ Leavitt Group Referral Program





HOW CANDIDATES ARE FOUND



HOW THE REVENUE IS GENERATED

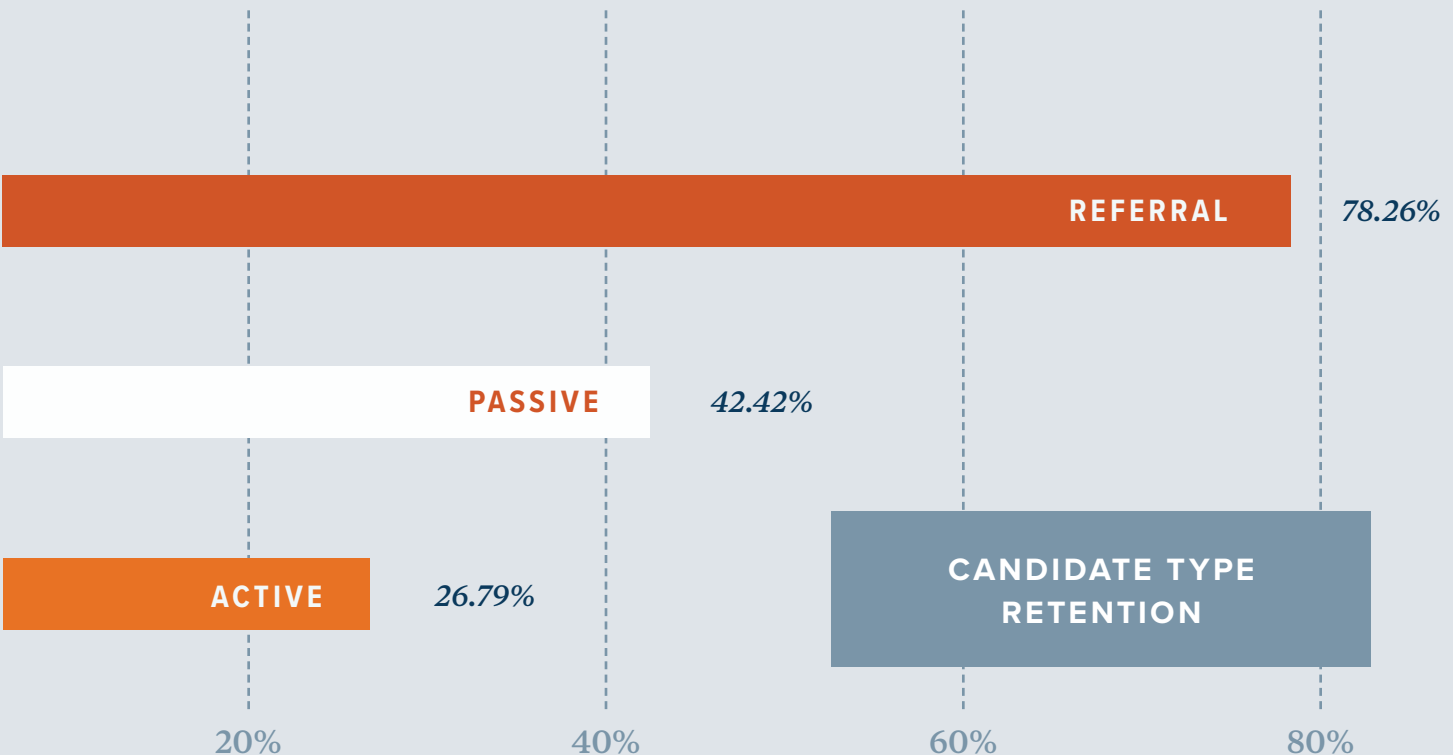


KEY

Active Candidate: An individual who applies for the role or actively seeks employment with Leavitt Group.

Passive Candidate: An individual who has been identified and contacted about an opportunity with Leavitt Group.

Referral Candidate: An individual who was referred to an opportunity with Leavitt Group.



CANDIDATE TYPE RETENTION

Select

During this stage, multiple rounds of interviews are conducted to assess candidates' personal traits, sales ability, and technical aptitude. This is done through the following:



PHONE SCREEN (15-30 MINUTES)

- ▶ Quickly eliminate most “B” and “C” players.
- ▶ Identify likely “A” players and sell the opportunity by asking these questions:
 - » Do they have the building blocks to be a producer?
 - » What sales skills do they have?
 - » What is their sales process?



FACE-TO-FACE INTERVIEW (ONLINE OR IN PERSON, AGENCY PARTNER INCLUDED IN THIS INTERVIEW)

- ▶ Seek patterns of behavior, not data.
- ▶ Learn about the candidate’s successes, challenges, and reasons for changes throughout their career.
 - » “What?”
 - » “How?”
 - » “Tell me more.”
- ▶ Give candidates time to ask questions and interview Leavitt Group.
- ▶ Give an objection to the candidate (if applicable) to see how they deal with rejection.

SALES ASSESSMENT AND CANDIDATE SUMMARY

Final candidates will be given a personality assessment tool to measure their thinking style, behavioral traits, and interests. Final recommendations will be made to the agency partner and co-owner(s) based on a comprehensive evaluation of each candidate’s qualifications.

Onboard



The Sales Talent Acquisition Team works with the agency partners to create a customized Producer Compensation Management System (PCMS), also known as sales expectation charts and graphs, tailored to each producer candidate's compensation goals.

Additionally, we help connect and assist in getting the hiring manager connected with Leavitt Group's HR and legal teams to create offer letters and employee agreements for producer candidates.

Beyond the hiring process, we maintain ongoing involvement throughout the first year by closely monitoring revenue performance and acknowledging significant achievements, such as securing major accounts, to demonstrate our commitment to their sustained success.

TIP FOR SUCCESS:

Conduct regular check-ins to ensure new hires are on track and meeting their goals.



Why Candidates Choose Us

LEAVITT GROUP'S INSURANCE SALES VALUE PROPOSITION

- ▶ Compensation: No caps on commission
- ▶ Client Relationships: Trusted advisor, risk consultant
- ▶ Employee Investment: Mentorship, Sales Force Development Group (SFDG), Producer School
- ▶ Company Culture
- ▶ Value-Add Tools: Succeed, Flock, MiEdge, Risk Management Center, ZoomInfo
- ▶ Equity Opportunities: Deferred compensation and co-ownership, producer pathway

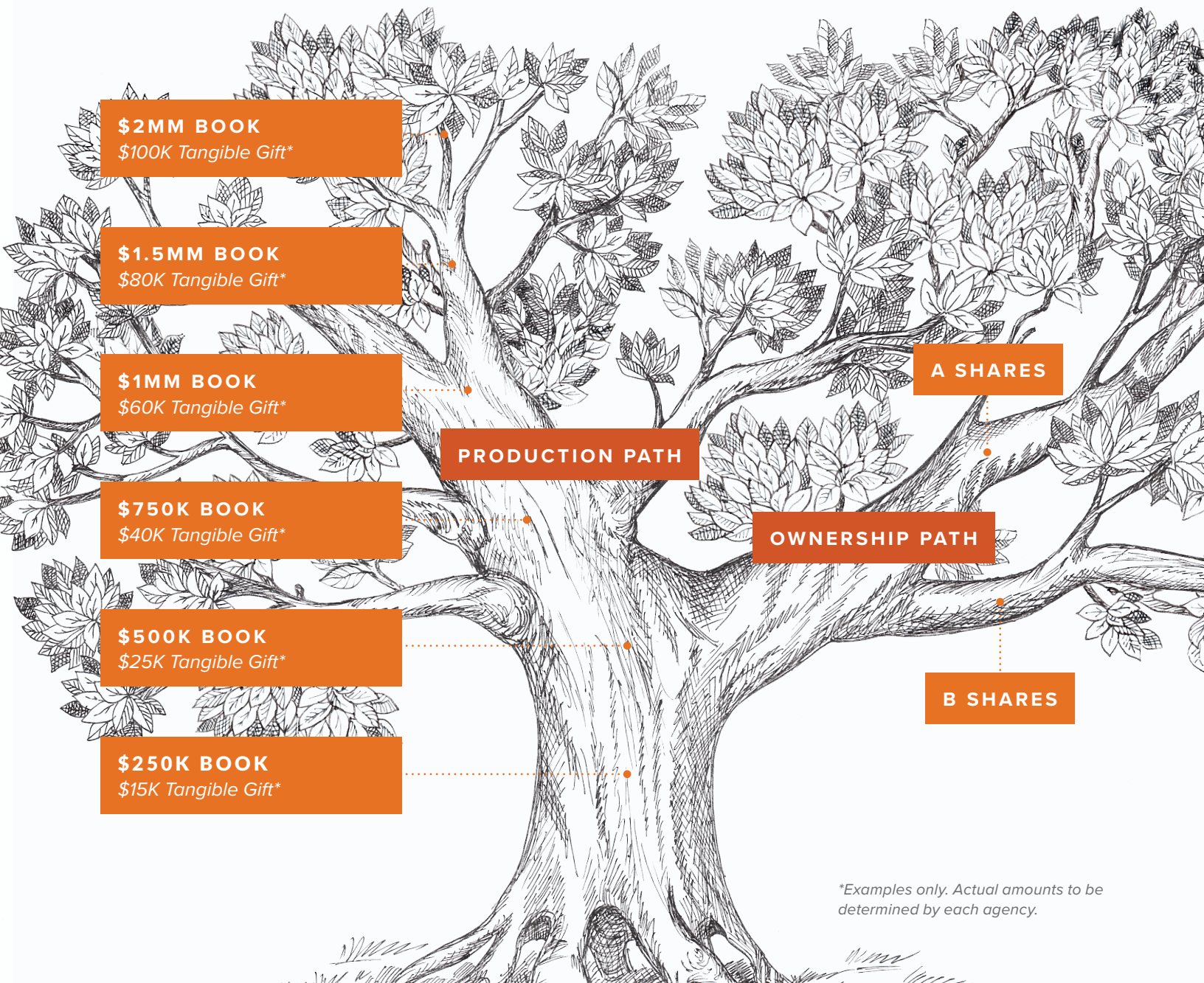
Why Insurance Sales?

Insurance sales offers a career path where individuals can thrive by helping clients protect their futures. It's characterized by financial stability, flexibility, and the opportunity to positively impact others' lives. Individuals can enjoy the flexibility of setting their own schedule, benefit from ongoing training and development, and cultivate meaningful relationships. A career in insurance sales offers opportunities to grow both personally and professionally in a field that values and rewards efforts.

Why Leavitt Group?

At Leavitt Group, our commitment to integrity, extensive industry resources, and strong partnerships empowers our team to deliver tailored insurance solutions that truly meet our clients' needs. With a rapidly expanding footprint and a culture that fosters career growth and opportunity, joining Leavitt Group means being part of a dynamic organization where your talents can thrive and make a real impact.

Producer Career Paths



PRODUCTION PATH

Lifestyle Enhancement Allowance
Deferred Compensation
Achievement Rewards: Tangible Gifts
Annual Incentive Trip



OWNERSHIP PATH

Shareholder Opportunity
Annual Performance Bonuses
Annual Incentive Trip



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www.leavitt.com/careers/insurance-advisors#win

Scan the QR code to learn more about what a career
as a producer looks like at Leavitt Group.



Leavitt Group Enterprises

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