



Service Offering Breakdown

Get to Know Our Services Better



Company Overview

We are a service company focused on practical solutions for General Insurance AR's, from strategy, systems, teams, marketing, sales and financial management encompassing team development.

Every business has its own unique story and challenges, so our services should be adaptable, not pushy. Long-term relationships are more important than one-off transactions.



John Burkhardt



What Do We Offer?

We summarize our services into three main categories:

01. Coaching & Mentoring

02. Digital Business Courses

03. Adhoc Consulting

All services can be combined or customized to suit your needs.



Coaching & Mentoring

Our Coaching is designed to support new and young AR's who need business strategy and support for their brokering and non-brokering activities.

We have two options depending on the speed of outcomes required.

We have positioned the pricing to achieve realistic ROI on the support applicable to where you are in your AR journey.

The most common need at this stage is:

- Avoiding burnout
- Getting back family time with loved ones
- Working realistic hours
- Systemising for efficiency
- Experienced support from outside your AR Group
- Creating a legacy business the can operate without you as the backbone



Coaching & Mentoring

05

Our Methodology

Find out where you are now – Your Current Reality
Clarify your Vision and Emotional Drivers
Solidify your Strategy to achieve your Vision
Work on the top 3 bottlenecks or challenges
Reset and Repeat

Along the way there is input into claims
management, quotations etc.

GOLD	PRINCIPALS PARTNER
2 x Scheduled Video Coaching calls per month	4 x Scheduled Video Coaching calls per month
Limited SMS Support – 4 /mth	Unlimited SMS Support
Limited Email Support – 8/mth	Unlimited Email Support
Clarity Calls – 2 per month	Unlimited Clarity Calls
Align 4 Growth Program Access	Align 4 Growth Program Access
\$1,375.00 per month (incl GST)	\$2,200.00 per month (incl GST)



Digital Business Courses

This is an online portal which supports your coaching journey with resources, templates and Group Coaching.

Access is included in both Gold & Principal Partners program which includes access to weekly group coaching call to ask any questions about how to apply the information (in addition to your normal coaching sessions)

06

01. Digital information on business model

02. Sales Aids which can be white labeled

03. Sales Presentations for educating clients



Ad Hoc Consulting

Occasionally something happens that needs one off attention with someone who knows the industry and your business.

The scope of work is quoted up as required.

07

01. Business Plan reviews

02. Workflow Design

03. Just Ask?



What is My Background

08

My Career was spent in SME Brokering after starting in underwriting.
I was based in Toowoomba and Sunshine Coast servicing clients Australia wide

Industry Experience

- Underwriting
- Claims
- District Inspector/BDM
- AR Business's
- 1 built up from zero clients and no network
- Set up for FSRA
- Merger
- Sale of books
- Exposure to different AR Groups

Industry Qualifications

Dip Fin Services (Broking)
Dip Fin Services
Tier 1 Qualified
ANZIFF (Snr Assoc -CIP*)

Current CPD as contract to LMI
College for Tier 1 and Diploma
Assessments

Coaching Certificate since
2009

Business Management
Business Administration
Cert IV Training & Assessment
J.P. Qual

Small Business Ownership

Insurance
Cafe/Health Food
Vending
Digital Products
IT & Website Development
Rural Upbringing

I've been where you are now!



Packages and Flexibility

Every business has different needs. That's why we offer flexibility and structured our packages accordingly.



Programs can be designed for AR Networks with individual AR requirements in mind depending on where they are on their Journey

Let's talk about what's best for your business.



Let's Chat Further

We're ready to hear your business story and help you find the solution that makes the most sense.



John 0422 247 256



John@GraceCoaching.au

Contact us at:

