



OAK & ASSOCIATES

Oak & Associates'

The Acorn Program

Would you like to have regular access to an expert consultant that not only knows the industry, but also knows your agency? Oak & Associates has a service called The Acorn Program in which our consultants work with you and your agency on a regular basis. This allows the owner to keep on top of the key issues impacting the firm and tap unbiased, expert advice on what needs to be done. Just like the acorn grows into the mighty oak tree, your firm will develop into a powerful and successful business.

The Acorn Program offers two levels of support for you and your agency. The foundation of the program is regular monthly consulting and executive coaching. The consultant will review with you the key issues impacting you at that time - agency operations, management issues, sales management, planning, etc.

In addition to the monthly consulting calls, the Acorn Program offers access to our other services at what would be reduced rates. Each year you can choose from a list of our services that you would like Oak & Associates to perform. By joining the Acorn Program you will also become a member of the Acorn Group. Members receive a periodic newsletter with special insights on business issues and the opportunity to attend Oak & Associates seminars or retreats at a discount.

Here is how it works:

First, Oak & Associates will discuss which plan is right for you and your agency. Both levels include two-hour monthly calls to discuss what is important at that time or to follow up on work in progress. This way, owners will have a coach that will keep them on task, as well as an outside expert to brainstorm on new ideas.

In addition to the monthly calls:

- **Level One** members can choose one of Oak & Associates services from the Acorn Group services list to have performed during the 12-month program.
- **Level Two** members can choose two of Oak & Associates services from the Acorn Group services list to have performed during the 12-month program.



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The Acorn Group Services

- Productivity Review
- Sales & Marketing Analysis
- Owner & Sales Compensation Plans
- Financial Analysis
- Annual Business Planning
- Sales and Marketing Planning
- Business Valuation (1)
- Business Succession Planning
- Other Customize Consulting Based on Agency Needs

For this program, work performed on site will be one to one and a half days. If a more extensive projected is requested, we can provide you with a quote for that service.

(1) The business valuation for this service is a modified version of Oak & Associates full Business Valuation Report. The report is limited in scope and focuses on the financial review of the agency. If a Acorn Group member wants the full Business Valuation Report, which includes an analysis of agency operations and book of business, there will be an additional \$3,000 charge, in addition to the monthly fees.

Costs

There is a one-year commitment when joining the Acorn Group

- **Level One** members pay \$750 only per month for the 2-hour monthly calls and one of Oak & Associates services during the 12-month program.
- **Level Two** members pay \$950 only per month for the 2-hour monthly calls and two of Oak & Associates services during the 12-month program.

Please note that expenses, such as travel, will be in addition to the monthly fees.

If you are ready to commit to success, call us to become a member of The Acorn Group!