

# The Value-Add of a Lifetime!

Learn how one insurance agent was able to achieve 16% of his annual commission goal *in one sale* by using RAI Stone Analytics!

## Situation

Dave started Financial Alternatives, an insurance and financial services agency, in Pennsylvania in 1974. He was anxious to boost sales while still offering the high level of personal care and attention that his clients had come to expect. He determined that the best way to accomplish this goal was to add an uncommon new dimension to his service. *“A lot of my competitors offer accounting services to their clients. Accountants are historians. They can’t tell you anything that you don’t already know. I’m looking for something unique; something to set me apart in this commoditized world.”*

Dave cares for his clients. He understands that his clients are the reason that he has been in business for 36 years. The satisfaction of his clients is goal number one, and he wanted a special way to express that. *“I wanted to give them something else. I wanted to show that I was going to bring value beyond their normal expectations. I wanted to show business owners that I care.”*

## Requirements and Selection

Dave had a few requirements that needed to be filled by the value-add he chose. *“I decided it had to be a unique tool, presented in a unique way. It had to be valuable and useful to my clients but not offered by any of my competition. I needed that competitive edge.”*

Dave remembered meeting a representative of RAI Stone Group at a conference and decided to inquire about their services. He was immediately impressed with the level of proficiency he found at the RAI Stone Group. *“They were highly professional, organized, super-credible... I knew right away that this was something that was going to impress my clients.”*

Dave chose to test the RAI Stone Analytics® model on a client that was looking to add a new building to his existing facility in order to meet a recent growth surge. The client risked losing current and new customers due to the inefficiencies encountered with his current building. The

client considered turning to a bank for a loan to finance the expansion, but wasn't sure he had the means to fund an advance of that size.

Dave understood that his client was apprehensive, especially about going for a loan amount large enough to cover their business expansion. Dave decided to offer the client a RAI Stone Analysis in order to decisively determine if the loan in question was practical. *"With RAI Stone Analytics, businesses can project— with accuracy— the impact of future decisions from a bird's eye point of view."*

## ***Implementation and Results***

The RAI Stone Analysis reinforced the fact that the loan was realistic and would achieve the client's growth goals and gave Dave's client the confidence to acquire a loan for **\$5 million**, enough to expand the business to meet the growth that he was experiencing. The client was so grateful to Dave for the suggestion of a RAI Stone Analysis that he contracted Dave's company alone for the insurance on the expansion- **a commission that equaled 16% of Dave's total annual commission goal!**

## ***Future Plans***

Dave was so impressed with the results of the RAI Stone Analysis and the positive reaction of his client that he decided to offer a RAI Stone Analysis to all future prospective clients. According to Dave, *"With RAI Stone, I am able to increase my sales with a product that supports the people I really care about- my clients. It truly is a win-win."*