

CULTIVATING TALENT IS HARD

Every insurance and financial service leader wants to have the right advisors in their salesforce. FindBob unlocks data on your advisors so you can make better decisions and improve performance.



A COMPLETE TRANSITION MANAGEMENT PLATFORM

40%

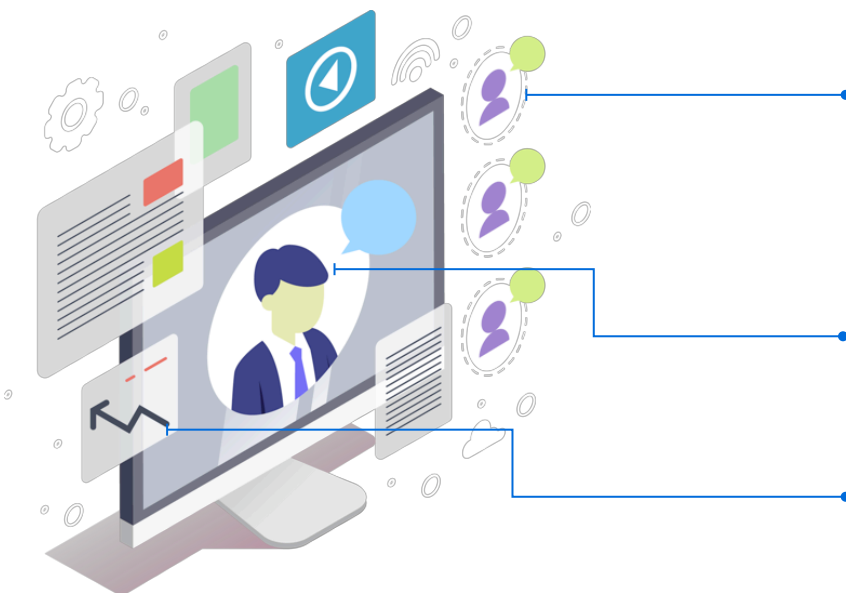
THE PROBLEM

Over 400,000 property and casualty advisors will exit the business by the year 2020. 40% of all life / health advisors plan on exiting in the next 8 years.

75%

THE OPPORTUNITY

75% of all agents and advisors would switch to a competing firm that supported their transition goals.



BUSINESS CONTINUITY

Arm your home office leaders with the tools to cultivate and engage the next generation of advisors.

REDUCE RISK

Minimize risk by developing the advisors needed to achieve today's organizational goals.

DRIVE GROWTH

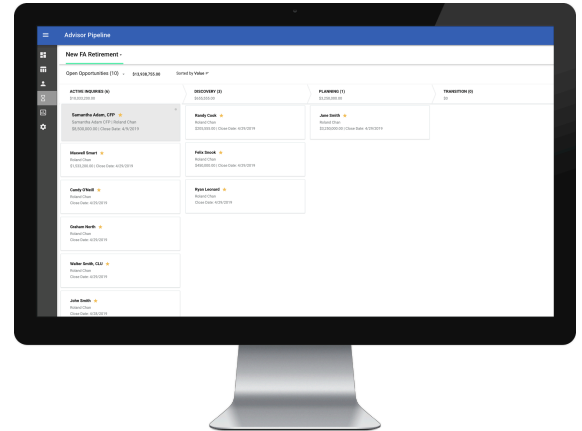
Keep a watchful eye on pools of advisors and capabilities required to fuel future growth.

STRATEGIC ADVISOR MANAGEMENT

For leaders in the Home Office, succession planning and management is much more than simply transitioning ownership of books of business internally. It's about identifying key assets and having the ability to recognize gaps within your distribution.

FindBob's advisor management suite will give your field leaders the tools to:

1. Objectively assess your inventory of advisors / advisors so you can identify, develop and retain the talent which your organization requires to succeed.
2. Unearth advisor talent by utilizing talent navigation tools that provide in-depth advisor & advisor talent profiles.
3. Understand the risk and impact of key advisor loss, visualize your distribution's next generation, and analyze gaps in key segments of your distribution.



ADVISOR ENGAGEMENT

It's imperative that any advisor planning and management strategy engage both their key advisors / advisors as well as their next generation talent.

With FindBob's enterprise private white-labelled marketplace, empower your distribution to proactively explore opportunities to buy, sell, merge, seek continuity or succession relationships within your distribution.

ADVISOR ACQUISITION

Recruiting is critical to the success of any business. Whether its filling existing talent gaps or positioning your distribution for growth, finding the right advisors efficiently requires sourcing candidates and internal coordination.

With applicant tracking tools from FindBob, companies can attract external talent to internal opportunities, organize and rank candidates, and share with their talent acquisition teams.

