



rushing onto the field



Ron Fuhrman

Senior Specialist, Employee Benefits
True North Companies, LLC

At The Wisdom Link, we are privileged with supporting some of the most successful entrepreneurs in North America. Many of our clients are leaders in their respective fields with both the audacity and capability to challenge industry conventions and raise standards of service. One of these clients is Ron Fuhrman.

Ron serves True North Companies, LLC, a highly successful insurance and financial strategies firm with offices nationwide. Ron is tasked with overseeing the employee benefits division as senior specialist. He takes a philosophy-driven, consultative approach to benefits navigation, by introducing an accountability and wellness aspect, using online solutions and education for both the client as well as the employees.

Faced with a volatile economy as well as changes in healthcare and fiduciary law, Ron and his partners knew they would have to think strategically about their long-term business prospects. However, instead of attempting to hold on to waning business methods, the True North team recognized an opportunity in the industry due to new challenges faced by business owners.

Through The Wisdom Link, Ron packaged his wisdom and built tools to support the proprietary solution he developed, The Benefits Navigator™. With these tools, Ron has begun a mission to change the norms by revealing the truth of the system and demystifying 40 years of industry myth.

“ ROI? In the first 90 days I would say the return has been 10-to-1. Our sales cycle is shorter. We closed three out of the last three of our clients and we were able to do it faster because we were telling the story better. After a year, I expect our return will be 50-to-1. ”

challenges

PROCESS CLARITY

When Ron came to The Wisdom Link he was struggling with his offering. It was a very simplified approach which only made sense to him. He had to explain it to each client as well as his employees before they would understand. Ron knew that to use this system effectively, it would need to be able to stand on its own. He would need clarity of understanding and message so all his people would be launching from the same platform.

SUPPORT TOOLS

Ron's ambition for growth was insatiable and he knew he could not expand alone. However, while he could run his process with an incredible success rate, doing so had become so second nature to him it was often difficult to articulate the finer points to his team.

The overall project represented an all encompassing picture of the business. The client-facing side would need to be supported by tangible systems and structures to help him deliver. He knew that somewhere in his mind were the tools to successfully support his staff, partners and clients.

ACCOUNTABILITY

Ron and his team were stretched thin with their responsibilities to the company, which made finding time to grow and develop the business a difficult chore. Ron knew that all the good ideas in the world were not going to get the job done. To take his company to the next level, he needed someone to help him see what was next and push him to get there.

INDUSTRY BIAS

Ron's team was also facing a bias in the market. What True North Companies, LLC was offering their clients from a value standpoint was huge and what made them different was how they executed their process. No one else could deliver solutions that could stand up to healthcare reform and the rising cost of insurance. He needed a piece strong enough to stand against what everyone else was telling his clients. His industry at the time was price-driven, but what he was offering was not a commodity.

actions

HARVESTED WISDOM

The True North team participated in the Capital Creation ApproachSM, where they went through a series of steps to hone their understanding of their audience, what they valued and how they served them. We harvested this wisdom, defined his Wisdom PlatformSM (the future business structure) and structured his offering into a clear, concise story.

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“ At any good seminar you go to, you come back with ten good ideas and implement none of them. The added value of The Wisdom Link is the accountability to use the tools and roll them out and get them done. ”

DESIGNED THE PIECE

Once we were all working from the same platform, we drafted copy, designed a customized graphic representation of his offering and gave it a name. All the while we kept in mind the established voice and style of True North so it would be recognizable by clients and resonate with the staff.

REFINED THE PROTOTYPE

Ron's needs required swift action. So we immediately condensed our work with Ron and his team into a sales presentation for them to use in his upcoming client meetings. The True North team wasted no time bringing the prototype into field testing and provided us with valuable staff and prospect feedback for us to continually refine the work.

CREATED TOOLS

Ron's partners were excited with the sales communication tool, but wondered how they were going to deliver on their promise. For this they turned to our Tool BuilderSM program. We worked with Ron to define the needs of his situation and developed a customized set of tools to support his company. We created a timeline and an accountability plan to ensure he could roll them out in a timely manner and implement them in the field.

results**CLIENT RESULTS**

In the face of a tumultuous economy and an uncertain future for the financial and insurance industries, Ron and his team closed three out of their next three prospects and are continuing to expand the True North staff. Ron reports that his most significant value discovery was the shortening of the sales cycle. He is able to more quickly and more accurately identify clients, wasting less time walking from suspects and closing prospects.

PROCESS CLARITY

The result of our efforts with True North was a clear sales communication piece that visually represented their unique offering in a way that looked and felt professional. The material has given Ron's team a consistency of message that increases pride and confidence. Both he and his clients can see that it is more than just words on paper. His is a truly unique offering, unlike anyone else's in his industry.

TASK MANAGEMENT

After our time with Ron and his team, True North made several important staffing changes that have allowed them to begin growing. One new employee is tasked with implementing the tools they develop with us at The Wisdom Link. Together we've ensured that each step of their process is backed up with defined tools, results and accountability.

review questions

1. What is the value proposition behind taking immediate action as Ron and his team did with their offering?
2. In what ways can you use a system of accountability to strengthen your team?
3. How can you quickly and effectively discern who your clients are?