

TRANSFORM YOUR PUBLIC
ADJUSTING BUSINESS BY
LEARNING WHAT TO FIX

Presented by **ClaimWizard**

AGENDA

- ★ Learn the *Business Hierarchy of Needs* and how to determine where your business fits
- ★ How to find what you should be fixing in your business
- ★ Why 'sales' and 'profit' are costing you time & money

ABOUT LYNETTE

- ★ Co-Founder, ClaimWizard
- ★ Certified Business Advisor
- ★ Published Author & Pro Speaker
- ★ Small Business Owner
- ★ Working with Public Adjusters
since 1996



MAKE THE VITAL CHANGE THAT WILL
LEVEL UP YOUR BUSINESS

FIX THIS NEXT

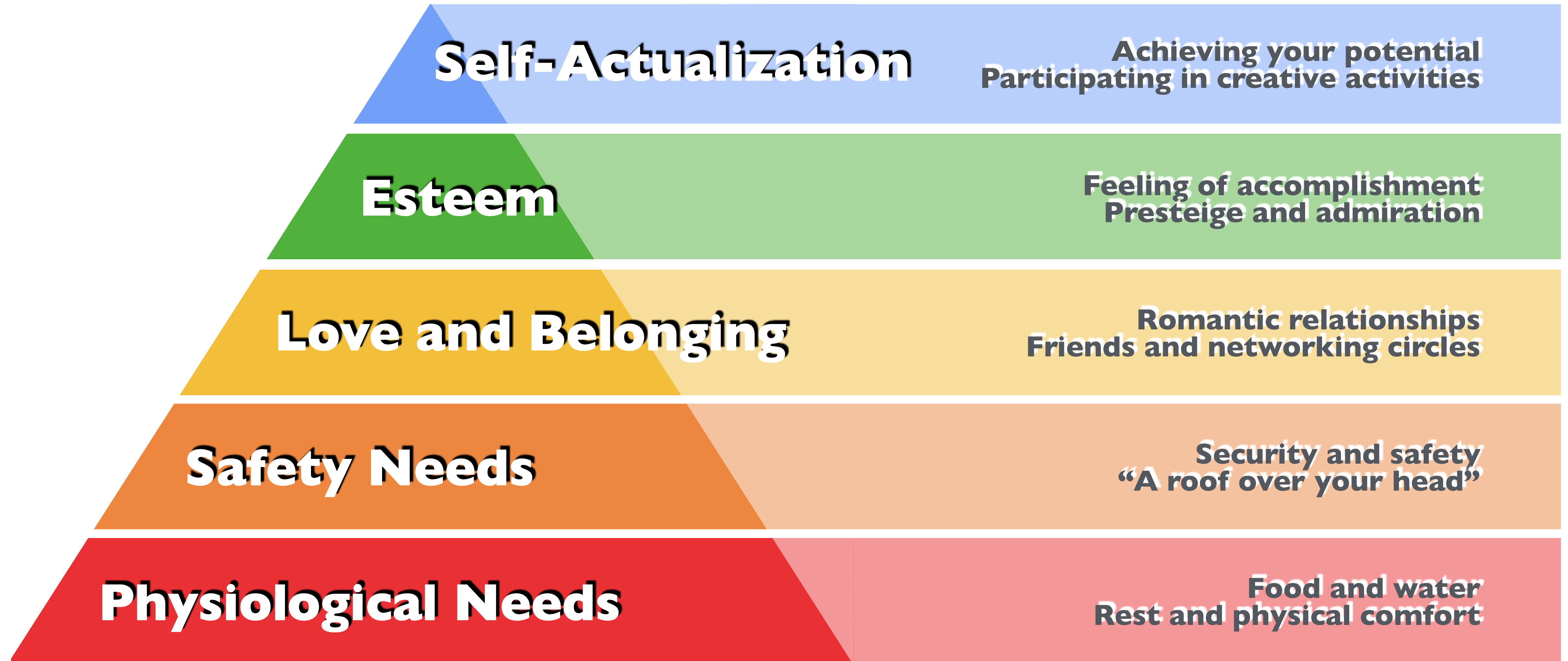
MIKE MICHALOWICZ
AUTHOR OF **PROFIT FIRST** AND **CLOCKWORK**



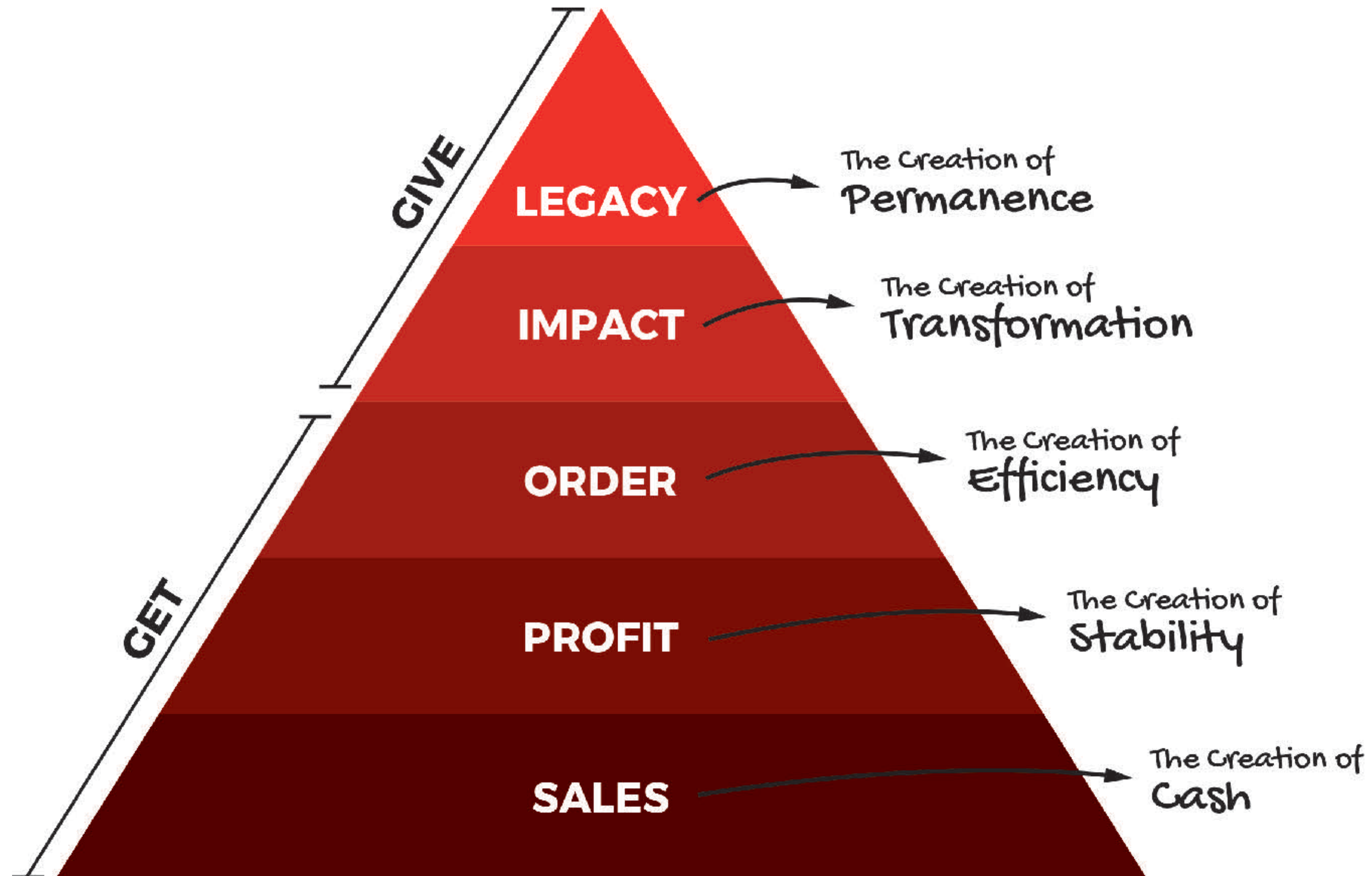
The background features a solid blue color. Overlaid on this is a faint, light blue graphic consisting of a bar chart with five bars of increasing height from left to right, and a large arrow pointing diagonally upwards from the bottom left towards the top right, passing behind the text.

BUSINESS HIERARCHY OF NEEDS

Maslow's Hierarchy of Needs



Business Hierarchy of Needs



Hierarchy of Needs

Business

Life

Legacy

Self-Actualization

Impact

Esteem

Order

Love & Belonging

Profit

Safety Needs

Sales

Physiological Needs

W i F i



WHAT TO FOCUS ON FIXING

SALES

- EVERY business absolutely must have an inbound source of income. It's the creation of **CASH** – the oxygen and lifeblood of every business.



SALES QUESTIONS TO ASK

- What sales are needed to support the business?
- Are there enough prospects in the funnel?
- Are you converting enough prospects to clients?
- Are you delivering on client promises?
- Do your clients fulfill their promises to you?

PROFIT

- This level encompasses the creation of **STABILITY** and assures that the business has longevity. At this stage, we focus on optimizing the business to run more effectively.



PROFIT QUESTIONS TO ASK

- Is your client making or costing you money?
- Do you have healthy margins?
- How many prospects do you lose to competition?
- Do you use debt profitably?
- Do you have enough cash reserves?

ORDER

- Order is the creation and maximization of **EFFICIENCY** through well thought out systems that keep the business running. The goal is to create consistency so the business can run on autopilot.



ORDER QUESTIONS TO ASK

- Do you have a functional process to reduce bottlenecks and inefficiencies?
- Are employee roles and responsibilities matched to their talents?
- Are the people closest to the problem empowered to resolve it?
- Can your business operate when key employees are unavailable?
- Is your business known for being “the best” at what you do?

IMPACT

- Impact is the need to create **TRANSFORMATION** through the business. The transformation and lifelong impact on the customers, clients and other stakeholders in the business.



IMPACT QUESTIONS TO ASK

- Are you looking to help clients beyond the claim?
- Are employees motivated by company mission or individual goals?
- Are employee goals aligned to company vision?
- Are employees empowered to give critical feedback?
- Does the business seek out vendors to collaborate with and improve the client experience?

LEGACY

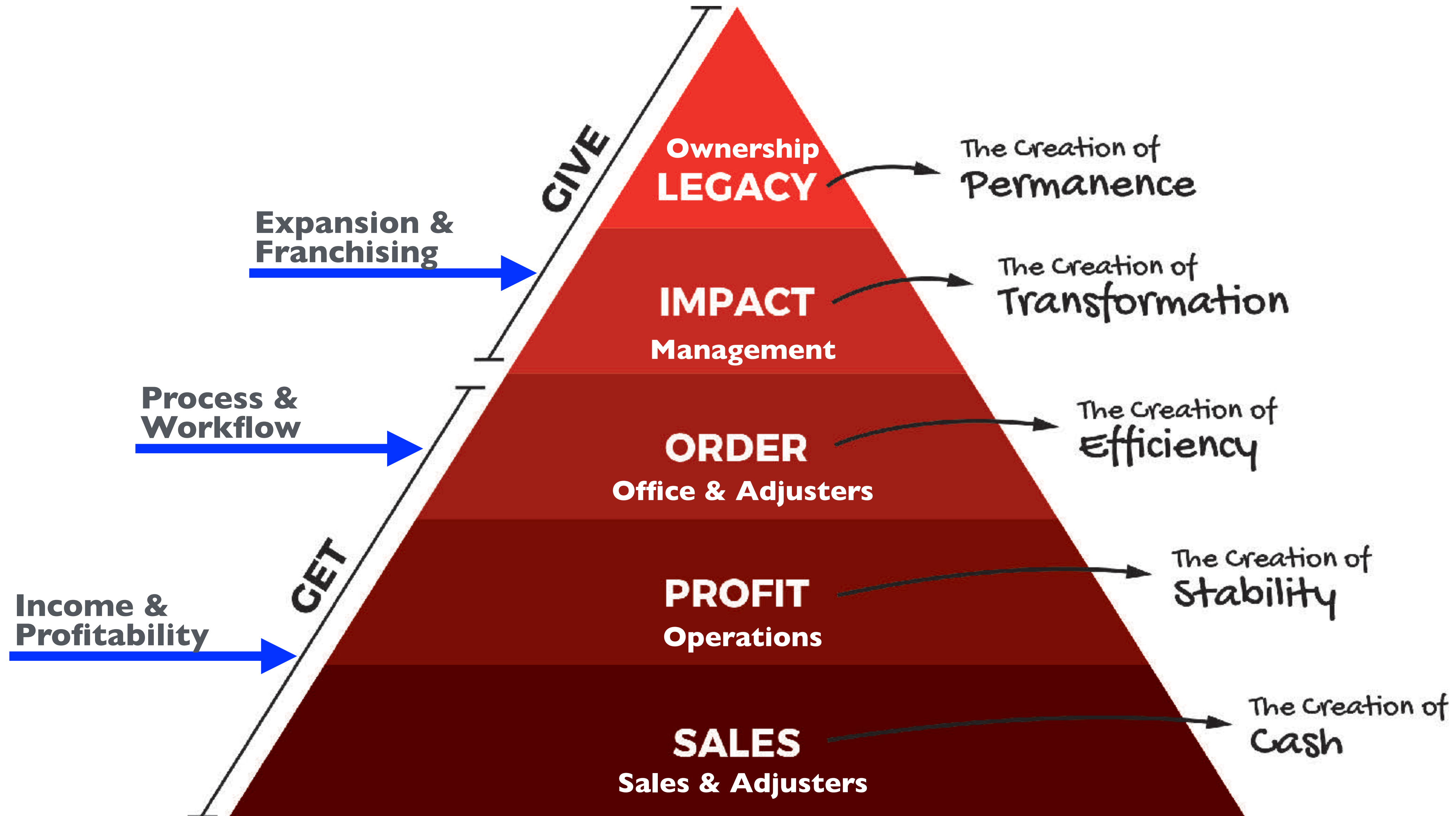
- Legacy is a mature need that focuses on the creation of **PERMANENCE** of the business. This is the level where the business owner transitions from owning the business to becoming the steward and leader of the organization.



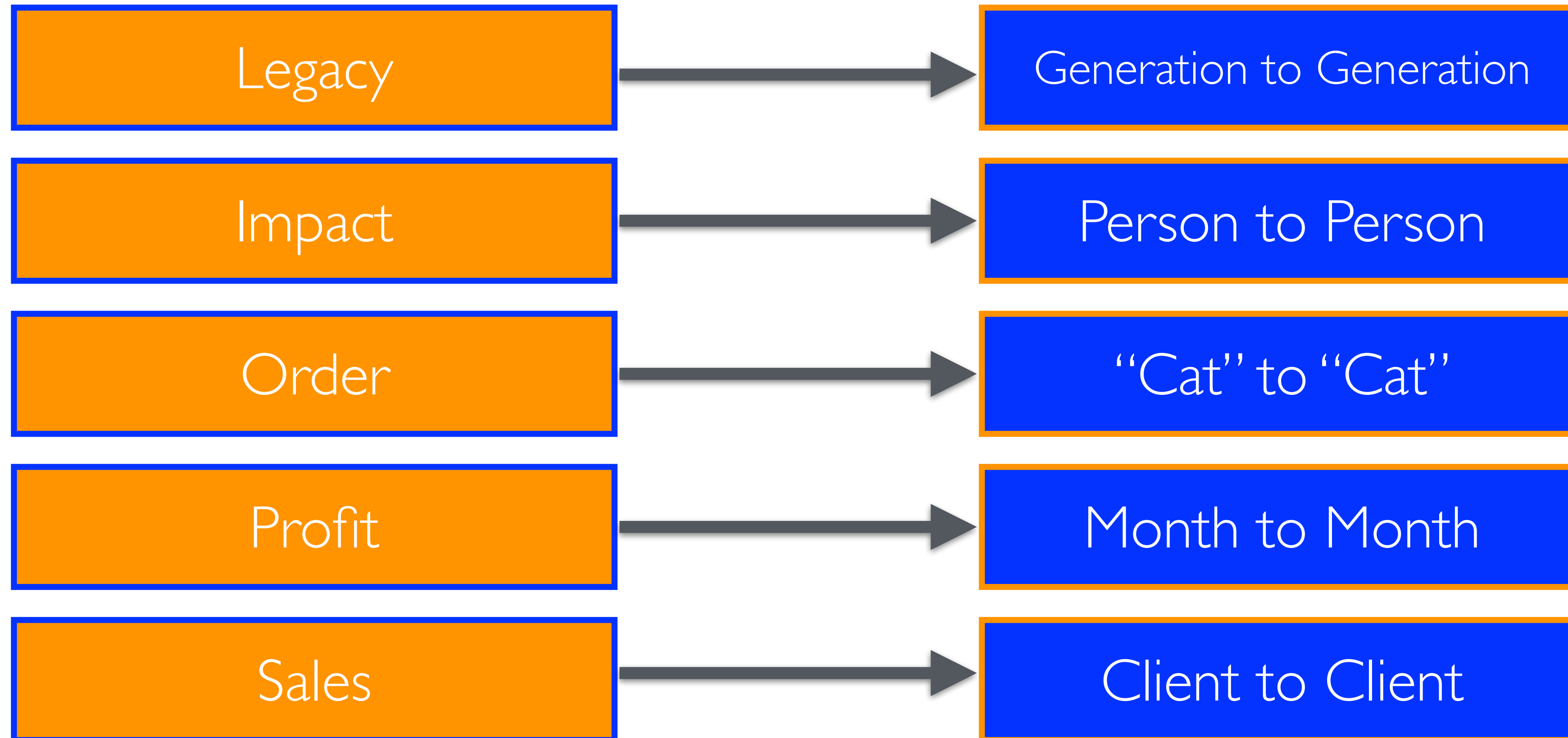
LEGACY QUESTIONS TO ASK

- Do your customers defend and support your company?
- Is there a plan to transition leadership?
- Is your company promoted without the need for direction?
- Is there an organizational strategy in place?
- Is the company designed to adapt and improve to be better?

Base Needs Must ALWAYS Be Met Before Those Above



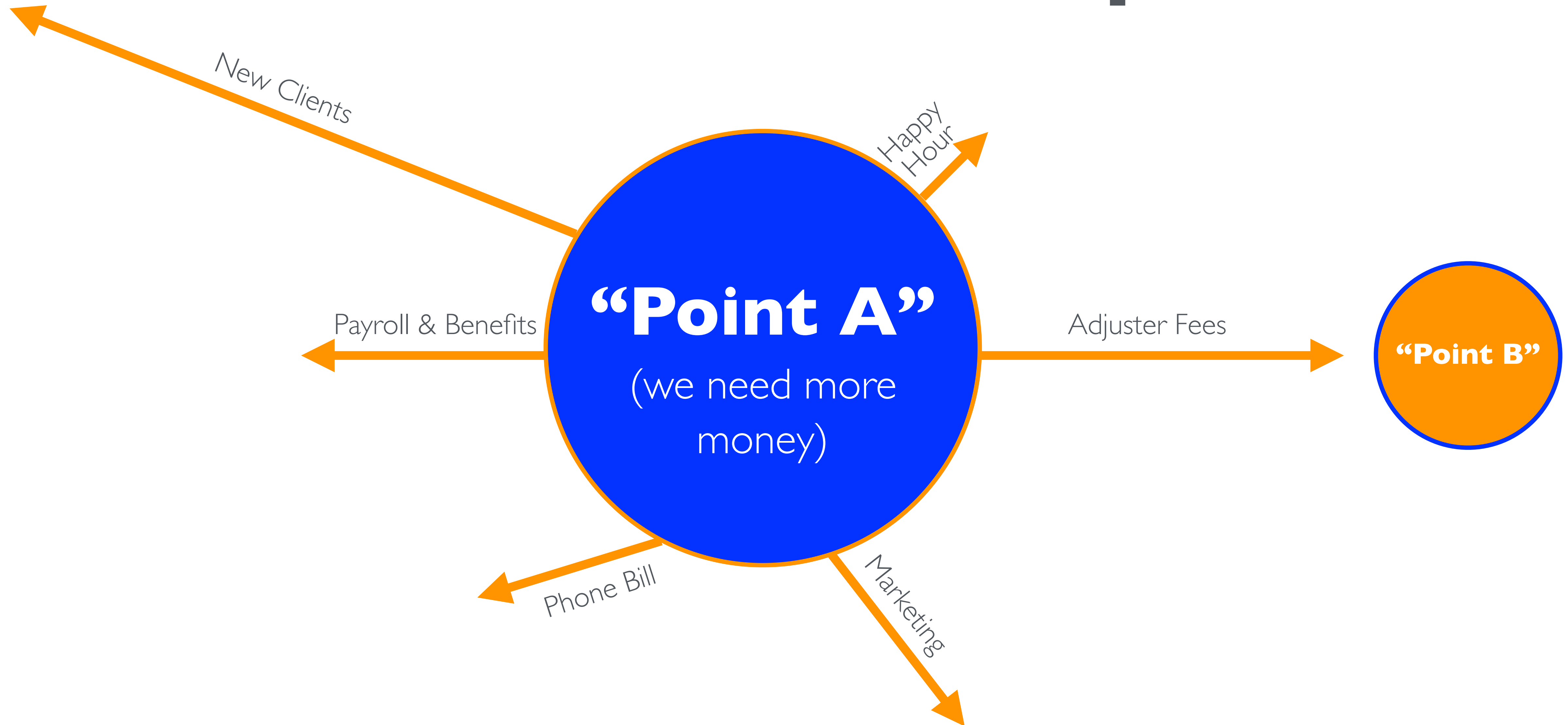
Public Adjusting Company Hierarchy of Needs



A blue piggy bank is centered in the background. On its side, there is a circular clock face with tick marks and hands. The text is overlaid on the piggy bank.

PROFIT VS. SALES
TIME VS. MONEY

The Survival Trap





MORE
RESOURCES

MAKE THE VITAL CHANGE THAT WILL
LEVEL UP YOUR BUSINESS

FIX THIS NEXT

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CLAIMWIZARD.COM / WEBINAR

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How to Deal with a Sudden Influx of Public
Adjusting Business

★ **September 9, 2020** : 10 Ways to Make
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