

Driving 64% Revenue Growth and enabling hyper-growth

ABOUT SOUTHWESTERN INSURANCE GROUP:

Southwestern Insurance Group are an independent insurance agency located in Nashville in the United States of America. They specialise in providing personalised insurance solutions to individuals, families, and businesses.

COMPANY SIZE:

2-10 employees

INDUSTRY:

Insurance

SBR SERVICES:

Sales enablement, sales transformation, sales performance, revenue growth strategy, sales playbooks & sales guides, sales training, sales leadership, sales coaching

53% growth

in the first year

64% revenue increase

year-on-year

15% increase

in average deal size

10% increase

in policies per client

3% reduction

in cost of sale

Ramp time reduced

from 7 months to 3

23% of revenue

from referrals

+100 NPS

in client satisfaction

The client's issue

Achieving hyper-growth in a competitive market

Southwestern Insurance Group (SWIG), a 5-year-old startup B2C insurance broker, had grown to \$2 million in revenue and \$12 million in gross written premium. Their parent company challenged them to become the largest business in the family of companies, aiming to exceed \$150 million in revenue. The senior team, though highly successful salespeople, were running a business for the first time and felt daunted by the challenge. They sought support with business planning, diagnosing constraints, and implementing measures to enable rapid sales growth effectively.

The return on investment

Remarkable ROI and business transformation

- **53% growth** in the first year, surpassing the budgeted 39%.
- **64% year-on-year revenue increase** against a budget of 42%.
- **15% increase in average deal size** despite a declining market.
- **10% increase in policies per client** due to better lead qualification.
- **3% reduction in cost of sale.**
- **Ramp time for new hires** reduced from 7 months to 3 months.
- **23% of revenue** from referral income with a **38% conversion ratio.**
- Full return on investment achieved within a few months on a gross margin basis.
- NPS score of +100, indicating high client satisfaction.

SBR's strategy to execution

Strategic sales enablement and business planning

SBR Consulting conducted a deep dive business plan and diagnostic, making 29 recommendations grouped into five key programs. These programs laid down a structured methodology for client engagement throughout the sales pipeline. SBR continued to coach the leadership team, embedding better ways to drive key results such as increased sales volume, value, and velocity. The approach fostered a culture of collaboration and alignment, with the customer at the center of focus.



"The project put a lot of fuel on the fire because SBR saw how serious we were about investing in our growth. We went from seven months to three in agent ramp time, and the team tracked significant referral and revenue improvements.

The team as a whole is just more bought in than they've ever been. The clarity of our vision and the speed at which we're trying to go for a specific target empowers everybody to work towards the goal.

We can have more confidence in the investment we're taking this year and the return we hope to get. It took some weight off my shoulders in a way."

David Stuart

Founder & President