Customer Success Story:

Bender Insurance Solutions

Transforming Sales at a 80-Year-Old Family Business

Company Overview

Bender Insurance Solutions is an 80-plus-year-old, third-generation, family-run independent agency serving commercial and personal insurance clients across California's Sacramento Valley. With around 50 employees and more than $10 million in revenue, they're known for long-term relationships, high retention, and deep community involvement, backed by an ESOP structure designed to keep the agency independent for the long haul.

The Challenge

Bender had built a strong business on relationships and service, but the sales side wasn't keeping pace with their strategic plans. Several top producers were nearing retirement. One rep consistently carried the top spot while others delivered uneven results. New hires weren't ramping predictably, and average sales per rep had stalled. We were replacing a full-time sales manager whose approach was not being embraced by the whole team.

At the same time, the company was working through a generational transition. Leadership wanted more predictable new-business growth, clear and fair expectations for every producer, and a sales structure that would outlast any one person.

The Decision: A Fractional Sales Leader Who Could Fit the Culture

Bender was referred to Sales Manager Now for seasoned sales leadership that could bring discipline to the sales department without disrupting a strong, family-centric culture. They were looking for a partner who would help the next generation of producers become consistent performers while still honoring the way the agency had always served its clients and community.

The Approach:

Sales Manager Now stepped in as Bender's fractional head of sales, focusing on structure, accountability, and cultural fit.

Key actions included:

- Defining and documenting a clear sales process that everyone followed, from prospecting through close and handoff.
- Putting simple weekly reporting and metrics in place so leadership and reps could see activity, pipeline, and results at a glance.
- Clarifying expectations and applying them equally to every salesperson, improving both fairness and focus.
- Turning weekly sales meetings into working sessions built around pipeline, accountability, and real selling conversations, backed by one-on-one coaching.
- Helping the team lean more intentionally into larger accounts and referrals, building on Bender's long-standing relationship base.

The Impact

Over nine years of partnership, Bender's sales organization moved from "best effort" to a disciplined, repeatable system:

- Set new highs in new-business sales for three consecutive years.
- Increased average sales per rep, with multiple producers now contending for the top spot each year instead of just one.
- Hired and successfully onboarded four new producers using a defined orientation and ramp-up plan.
- Grew new-business revenue while maintaining strong retention across the existing book, giving ownership confidence that future growth could be supported.
- Together, Bender and Sales Manager Now turned a legacy, relationship-driven agency into a business with a modern, teachable sales system. The result is a stronger foundation for succession, growth, and independence—without losing the culture that made the firm successful in the first place.

> **The Sales Manager Now approach worked because our manager brought clarity to who we serve, how we win, and what to do next.** A tailored approach to our culture and the realities of an insurance agency was implemented, making it practical and sustainable. Our manager coached people as much as managing metrics, so performance improved through better habits, confidence, and communication. Bottom line: it was structured, realistic, measurable, and led in a way that earned buy-in—not just metrics compliance.
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> - Edward Johnson
>
> Vice President, Construction Risk

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