



At Angela Adams Consulting, we continue to be the foremost authorities in insurance agency consultative and support services. We are seasoned professionals deeply immersed in the nuances of Insurance Agency Operations. Our unwavering dedication to the insurance industry has positioned our firm as a pivotal collaborator with insurance agencies, exploring diverse aspects such as accounting intricacies, system efficiency, operations optimization, CSR outsourcing, training methodologies, HR practices, marketing strategies, financial management, and more!

In our commitment to innovation, we are thrilled to present a fresh and dynamic approach to keynote and educational sessions for any Insurance Industry event. Our sessions aim to showcase topics that not only innovate but also captivate audiences, reflecting the cutting-edge work we undertake daily. We are confident that our presentations will resonate with attendees, offering insights that go beyond the conventional and inspire new perspectives.

Enclosed herewith are our class submissions, carefully curated to align with our pioneering spirit and commitment to excellence. We look forward to the opportunity to share our expertise through engaging instructional sessions, contributing to the success of your event!



Shining the Light to Your Success!
Insurance Agency Operations Experts Since 2001!

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Is Strategic Planning Dead?



Presenter: Angela Adams

Track: Executive Management

Maybe... In the fast-paced realm of business management today, your strategic plan needs constant recalibration—updating almost as swiftly as the ink dries. The landscape is marked by the rapid launch of new technologies, the escalating challenges of talent acquisition and retention, a dynamic career environment, and the strategic maneuvers required to engage clients in today's hard market. The conventional fall planning ritual, aligning your initiatives with goals, budgets, and personnel, has essentially become obsolete.

Join Angela Adams, President of Angela Adams Consulting, in an illuminating discussion on the imperative of Strategic Agility. While strategic thinking remains a vital leadership component, embracing agility is the key to effectively responding to this ever-changing business environment. Angela will guide you through a comprehensive exploration, encouraging you to adopt the same panoramic view—akin to the 3,000-foot perspective traditionally reserved for strategic planning sessions.

This class isn't just about theory; it's a practical guide to liberate your agency from the operational weeds, redirecting your focus to initiatives that reposition you for sustained success. Gain insights on navigating your agency with confidence, agility, and mindfulness, shedding the frantic "hair-on-fire" approach. Elevate your leadership acumen and operational effectiveness by attending this class—a transformative experience designed to equip you for success in today's dynamic business landscape.



Shining the Light to Your Success!

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Leverage Your Tech Spend

Presenter: Angela Adams & Kevin Wheeler
Track: Executive Management

Technology is a significant investment, but the key lies in choosing the right tools to align with your goals and then unlocking their full potential. Join Angela and Kevin in a live seminar that draws on over 20 years of expertise combining a deep understanding of effective agency operations with extensive experience honing in on the right tech tools for success.

Angela and Kevin will discuss ways to take stock of your tech tools, align them with your agency goals, and explore the latest innovations. Discover how to avoid the pitfall of skimping on technology budgets and, more importantly, how to avoid wasting your investment on the latest flashy software. Learn to prioritize and implement technology in ways that have a profound impact on your agency's success.

Don't miss this opportunity to gain insights that will reshape the way you approach technology, ensuring it becomes a powerful ally in achieving your agency's goals.



First and Lasting Impressions: Elevate Your Agency's Impact



Presenter: Angela Adams and Tracy Knight
Track: Executive Management

Unlock the secret to unforgettable first impressions! This session begins by emphasizing the crucial role of a well-defined mission and vision, ensuring that every facet of your agency, from staff to procedures, aligns seamlessly with your overarching goals. Learn how to cultivate a distinctive brand personality that extends to communication styles, aesthetics, and consistency, setting the stage for impactful and enduring impressions.

Uncover the secrets to attracting and retaining your ideal clients by clearly identifying your target audience. Navigate the customer journey with precision, evaluating each phase from the lead to the client through the lens of your target audience. Explore strategies to convert prospects into clients, address pivotal moments in the client lifecycle, and discover effective methods to overcome common pitfalls during renewals, reviews, and claims.

As a bonus, discover how to apply this client-centric approach to enhance your employee experience, attract top talent, and boost overall employee engagement and morale.

This insightful session goes beyond the surface, digging into the core elements that contribute to a lasting and positive impression. Don't miss your chance to take home actionable insights that will elevate your agency's brand, cultivate robust client relationships, and ensure lasting success.



What We Wish We Knew Before Selling the Agency

Panel Discussion: Kevin Wheeler,
Track: Executive Management

Embark on an enlightening panel discussion led by insurance consultant Kevin Wheeler, a seasoned expert who has personally sold his agency. The panel will consist of at least five former owners who have perpetuated through various paths.

This illuminating session invites you to an open dialogue, tapping into this panel of experts willing to share a wealth of insight and first-hand experiences in navigating the journey of selling an agency.

Engage in a dynamic exchange covering pivotal aspects, from assessing your agency's strengths to structuring deals. Gain unique perspectives on the emotional aspects post-sale. Join us for this incredible discussion of colleagues who have been there, done that, and are excited to share their unique experiences with you!



Leadership Mastery for Insurance Executives



Presenter: Angela Adams & Tracy Knight
Track: Executive Management

Don't miss this opportunity to invest in your leadership journey and secure the future success of your organization. In this session, we'll outline the four pillars of leadership to help you unlock the secrets to leadership mastery through self-awareness, effective communication skills, organizational awareness, and a strategic mindset tailored for the insurance sector. Embark on a transformative journey as we distill the most impactful insights from revered authors in the realm of leadership skills. Delve into the art of seamlessly integrating managerial expertise with visionary leadership, fostering a synergistic approach that adeptly navigates challenges and propels organizational triumph. Featuring Angela Adams, President of Angela Adams Consulting, as she illuminates the discussion with her own experiences, sharing invaluable lessons, successful strategies, and indispensable insights gained from developing the next generation of leaders in her own company. Don't miss this chance to lead your insurance agency to new heights—join us and accelerate the enhancement of your leadership skills.



Shine Bright Online: How to Transform Your Online Presence Starting Now

Presenter: Tracy Knight & Steph Abplanalp
Track: Sales/Marketing

Join forces with Tracy Knight and Steph Abplanalp, the dynamic marketing duo behind Angela Adams Consulting, for a session on supercharging your insurance agency's online presence. Get ready for a high-powered dive into easy-to-understand strategies that unlock the keys to success in the digital world.

Discover a wealth of actionable tactics that break the mold, propelling your agency toward unprecedented growth year after year. Gain exclusive insights into dominating Google listings, improving your website, boosting social engagement, mastering the intricacies of SEO, and sculpting an unmistakable brand identity that captivates online audiences.

This isn't your average seminar—it's a dynamic playbook distilled from our own trailblazing victories. Bid farewell to conventional approaches; these straightforward steps are custom-built to set your agency apart in a competitive arena. Amplify your visibility and fortify your agency's digital stronghold with these effortlessly adaptable strategies. Get ready to claim your spotlight and thrive in the digital landscape!



The Magic of Marketing - Made Simple



Presenter: Tracy Knight & Steph Abplanalp
Track: Sales/Marketing

Don't let marketing intimidate you any longer! Join Tracy Knight and Steph Abplanalp, the powerhouse duo behind the incredible brand of Angela Adams Consulting. In this empowering session, we'll turn daunting marketing strategies into easy-to-understand, actionable steps your team can start today.

Say goodbye to bewildering marketing jargon and embrace clear, actionable strategies designed to elevate your agency in today's fiercely competitive landscape. From the fundamentals of content marketing and the art of storytelling to mastering social media dynamics, this class is a comprehensive guide to navigating the intricacies of modern marketing.

Unveil the secrets behind our exceptional email campaigns—clear, practical steps that fueled our own success, amplifying open rates and driving steady growth. Explore effective engagement techniques for both new and existing customers and hands-on tactics for meaningful offline engagement. Learn how to tailor your approach for different customer segments and discover innovative methods to boost your agency's local visibility. Discover the untapped potential of partnerships and collaborations, and unravel the mysteries of data-driven decision-making.

This isn't just a class—it's your rallying call to stop hesitating and start taking charge of your agency's marketing! Tracy and Steph invite you to step into a realm where marketing becomes not just understandable but a driving force for your team's success.



Creative Marketing for Hard Market Resilience

Presenter: Tracy Knight & Steph Abplanalp
Track: Sales/Marketing



This session will illuminate the path forward for agencies seeking to innovate and capitalize on the challenges of a hard market. The seminar will explore a spectrum of creative strategies designed to fortify your agency's presence and deepen client relationships.

Delve into the art of storytelling using compelling video messages, unlocking the potential of this powerful medium to authentically convey your agency's message and forge profound connections with clients. Emphasizing genuine, human-centric video messaging, discover how to captivate and impress your clients.

Explore the realm of texting as a personalized communication tool, gaining an understanding of how to leverage this direct channel to keep clients informed, engaged, and reassured. Uncover the secrets to crafting proposals that not only articulate value but also leave a lasting impression.

Learn innovative approaches to client renewals, transforming routine processes into opportunities for meaningful engagement. Discover strategies to ensure clients not only renew but do so with enthusiasm. Gain insights into proactive client engagement, ongoing education, and establishing yourself as a trusted advisor.

Recognize the importance of meeting clients where they are, whether on social media platforms, industry communities, or other spaces. Acquire the skills to seamlessly integrate your agency into the environments frequented by your clients.

Seize the opportunity to gain a competitive edge in your industry. Tracy Knight and Steph Abplanalp, the marketing masterminds of Angela Adams Consulting, will empower you with tools and strategies to not only weather the storm but emerge stronger and more resilient than ever. Secure your spot now and redefine your agency's success in challenging markets!





Niche Nirvana: Crafting Connections with Your Ideal Client for Unmatched Agency Success

Presenter: Tracy Knight & Angela Adams

Track: Sales & Marketing

Success extends beyond acquiring clients; it hinges on fostering meaningful connections with those who resonate with your agency's core mission, vision, and strategic goals. This class delves into the transformative power of client alignment, transcending traditional transactions to create profound synergies.

During this seminar, you'll be prompted to explore the "why" driving your agency's existence and develop strategies for clearly communicating with your target audience. Gain insights into analyzing and optimizing your current client relationships, and learn to articulate and recognize the defining characteristics of your agency's ideal client. We'll guide you in crafting a compelling and unique value proposition that distinguishes your agency in the market.

Beyond the topic of insurance sales and marketing, we'll explore innovative approaches to connect with your audience, not just capturing their attention but positioning you as a trusted ally.

Walk away from this session equipped to master the art of multi-platform networking expanding your reach, establishing meaningful connections, and cultivating partnerships that contribute to increasing client acquisition and retention.



Workshop: What Makes a Successful Website

Presenter: Tracy Knight & Steph Abplanalp

Track: Sales/Marketing

Join Tracy Knight and Steph Abplanalp, the masterminds behind Angela Adams Consulting's marketing triumphs, for an eye-opening workshop. Dive deep into the world of insurance websites as we dissect what makes a standout site versus a lackluster one. With real examples at your fingertips, learn the tricks of the trade from our experts.

But that's not all! Tracy and Steph will equip you with a personalized action plan jam-packed with easy, actionable steps. Leave with a clear roadmap to enhance every corner of your website and turbocharge your SEO game. Get ready to level up your online presence and make a lasting impact in your industry!

*Don't forget ADA



Harnessing the Potential of Retention: Proactive Renewal Strategies for Success in Hard Market



Presenter: Kevin Wheeler & Tracy Knight
Track: Customer Excellence

Your agency's retention rates can experience fluctuations based on various factors, including market conditions and your approach to client relationships. Typically, the higher the percentage, the higher an agency's valuation and profit margin. Given that the insurance industry incurs the highest acquisition costs among all sectors, neglecting a robust and proactive renewal approach jeopardizes long-term profitability.

This session will address the importance of building strong client relationships and the correlation with higher retention rates. We'll guide you through effectively segmenting your clients, ensuring that you allocate resources in terms of time and effort for the greatest return. We will discuss ways to strengthen those relationships, particularly during the renewal phase, employing a range of tactics.

Prepare to discuss the latest trends in communication, including video communication, texting, social media, and more. Gone are the days of wordy emails and a captive audience. Your clients are bombarded with messaging daily – we'll explore tactics and communication strategies designed to wow your clients and save them the worry and hassle of shopping elsewhere.

In this interactive session, we will encourage the audience to share ideas and challenges and work together to generate innovative, actionable ideas you can take back to your agency right away. All attendees will receive a Renewal Success Planner to assist in staying on track and harnessing the potential of retention!



Navigating the Customer Journey: Elevating Your Client Experience



Presenter: Angela Adams & Tracy Knight
Track: Customer Experience

Our industry has the highest customer acquisition costs of any industry, and there is a direct correlation between high customer retention and profitability. We will guide you through the intricate process of prioritizing an impactful customer experience, emphasizing the indispensable role it plays in solidifying relationships and unlocking the full growth potential of your agency.

In this session, we'll demystify the concept of mapping your client's journey, providing practical tips and strategies to simplify the creation of memorable, positive experiences for your clients. From initial engagement to renewal, we'll help you identify pivotal touchpoints and potential areas for improvement.

Learn how to measure and analyze key metrics to track the success of your customer experience initiatives, allowing you to continually refine and optimize your approach.

We will also discuss ways to transform your agency's culture by instilling a client-centric mindset. Explore how a customer-focused approach permeates through every aspect of your organization, from frontline interactions to backend operations.

By the end of this seminar, you'll be equipped with the knowledge and tools needed to enhance your agency's customer experience and shape a future where your agency not only survives but thrives in the competitive landscape of today's insurance industry.





Proactive Paradigm Shift – Elevating the Customer Experience

Presenter: Tracy Knight & Angela Adams
Track: Customer Experience

Discover the power of proactive strategies in customer service! Join our seminar to shift from reactive firefighting to proactive excellence, anticipating and exceeding client expectations.

Discover the realm of cost-effective proactivity as we shed light on critical areas where a proactive approach proves more effective and economically sound compared to reactive solutions. Gain a comprehensive understanding of how proactively addressing challenges can lead to substantial cost savings.

Overcoming time constraints is a prevalent challenge in today's fast-paced business environment. Attendees will learn innovative approaches to seamlessly integrate proactive strategies, efficiently navigating common time-related obstacles. Additionally, delve into the art of conducting insightful client needs analyses, ensuring that your services stay ahead of evolving insurance requirements and provide tailored solutions.

We will explore the importance of regular policy reviews and technology-driven claims prevention programs, enabling participants to enhance coverage, deliver savings, and address client needs before they even arise.

You'll also learn how to master the art of impactful communication by strategizing proactive client interactions that not only keep clients engaged, informed, and confident in their decision to partner with your agency.



Successful Employee Onboarding: Unveiling Strategies for Success



Presenter: Tracy Knight

Track: HR/Staffing

Employee onboarding has undergone significant transformation in recent years as organizations increasingly recognize its pivotal role in shaping the employee experience and fostering long-term engagement. Numerous studies have underscored the substantial impact of effective onboarding on critical factors such as employee retention, engagement, and overall success.

In this enlightening seminar, Tracy Knight, Sales and Marketing Director at Angela Adams Consulting will unveil the key strategies behind our success in building a remote workforce exceeding 100 enthusiastic and loyal insurance experts. Our approach to onboarding extends well before the new hire's first day, encompassing a comprehensive array of tools and methods. Join us as we delve into the intricacies of leveraging automated messaging, engaging video content, robust and personalized training plans, our in-house Learning Management System (LMS), instant messaging, welcome kits, manuals, mentorship programs, and more.

This information-packed session promises to equip you with a wealth of ideas to enhance your employee onboarding processes. By adopting these strategies, you can create an environment that empowers new hires to successfully navigate onboarding, foster a deeper commitment to the team's success, prioritize client care, contribute to your agency's growth, and much more. Get ready to revolutionize your onboarding practices and lay the foundation for highly engaged and successful new team members.



Hard Market: Your Employees are Burnt Out



Presenter: Single Presenter - Tammy Wickard

Track: HR/Staffing

Join advisor Tammy Wickard for a session tackling the pressing issue of employee burnout in insurance agencies. As an insurance agency consulting firm, we've observed a concerning trend. Agency owners often overlook the toll that market pressures take on their hardworking teams. Gain insights into our observations and actionable strategies aimed at safeguarding your talent. Learn crucial approaches to prevent burnout, effectively support your team, and fortify your agency against market strains. Don't miss this essential session dedicated to preserving your team's well-being and agency productivity.



Cultivating Exceptional Talent: Find, Grow, & Retain Unicorns



Presenter: Angela Adams & Tammy Wickard
Track: HR/Staffing

In the rapidly evolving and fiercely competitive landscape of the insurance job market, the quest to discover and retain exceptional talent is paramount for stability and growth. Many agencies grapple with the challenge of replacing retiring professionals or training incoming talent only to witness them depart for more enticing opportunities. In this session, Angela Adams and Tammy Wickard explore strategies that foster a culture characterized by innovation, flexibility, and engagement. This culture not only attracts and retains top-tier talent but also lays the groundwork for cultivating your own unicorns poised to thrive within your agency.

The conversation will revolve around the distinct characteristics, skills, and attributes that distinguish an individual as a "Unicorn" within the context of the insurance industry. Participants will gain valuable insights into the reasons these exceptional individuals are highly sought after and, more significantly, how they play a pivotal role in the overall growth of an organization. Furthermore, our presenters will provide practical guidance on optimizing existing talent pools through staffing models meticulously crafted to harness and maximize individual skill sets. They will also share effective training strategies aimed at building confidence and expertise.

Join us for an enriching session that promises to equip you with the insights needed to navigate the complex landscape of talent management in the insurance industry.



Synergize for Success: The Blueprint of Collaborative Teams



Presenter: Angela Adams
Track: Operational Excellence

Unlock the secrets to agency success with Angela Adams, President of Angela Adams Consulting, as she unveils the transformative power of the collaborative team model. This strategic approach to operations management goes beyond traditional structures, enhancing efficiency, trimming costs, and strategically deploying talents to tasks. By recognizing individual strengths, investing in targeted training, and cultivating clear progression paths, agencies can ignite not only professional growth but also fuel a trajectory of agency growth.

In this engaging seminar, delve into the art of strategic agency tool implementation, navigate the nuanced responsibilities of sales, account managers, and processors, and master the techniques of crafting a customer experience that leaves a lasting impact. Learn how to build high-performing collaborative teams by aligning employee strengths with organizational needs, fostering a workplace culture that not only amplifies employee satisfaction but also leads to unmatched customer service. Elevate your agency's operational framework and pave the way for enduring success!



Unlocking AMS360: A Roadmap to Maximize Efficiency and Unleash Untapped Potential

Presenter: Panel Discussion - Angela Adams

Track: Operational Excellence



Join this enlightening panel-led seminar as we unravel the pivotal connection between system utilization and efficiency. Angela Adams Consulting invites you to explore the untapped potential of AMS360 in a session that promises to broaden your perspective.

Discover the full capabilities of your system and gain valuable insights into evaluating your current utilization state. Many agencies are unaware of the strategic steps required to make AMS360 the true backbone of their tech stack. Our panel of experts is set to guide you through an exploration of 17+ under-utilized features in AMS360, features that most agencies overlook or underestimate.

This interactive session is designed to open your eyes to the wealth of possibilities within your AMS360 system. Walk away with actionable steps and a clear roadmap to maximize functionality, bringing you one step closer to harnessing the full potential of your AMS360 investment. Don't miss out on this opportunity to transform the way you utilize technology for greater efficiency in your agency.



Navigating Modern Threats Through Advanced Disaster Preparedness



Presenter: Kevin Wheeler & Tammy Wickard

Track: Operational Excellence

When disaster inevitably strikes, the question becomes: How much trust can you place in your aging Disaster Recovery Plan? Join Angela Adams Consulting's seasoned operations experts, Tammy Wickard and Kevin Wheeler, in a focused session designed to modernize and enhance your approach to disaster preparedness. Tammy, based in hurricane-prone Florida, collaborates regularly with clients to ensure their agencies are primed to respond swiftly to disasters. Meanwhile, Kevin, a former agency owner, draws from firsthand experience managing the aftermath of a tornado that locked down his office and surrounding areas for over a week.

In this session, Tammy and Kevin bring their unique perspectives and insights, offering practical ways for your agency to glean valuable lessons from their real-world experiences. While traditional disaster recovery plans aim to minimize downtime and safeguard critical assets, the landscape has evolved. Technological advancements have led to new threats, including the expanding virtual workforce, biological threats, geo-political and economic instability, AI, and the escalating risk of cyber attacks.

A more holistic approach to disaster preparedness is overdue. Join us as we explore how technological progress presents opportunities to expand your response plans, addressing these emerging threats. By embracing these changes, you can bolster your agency's resilience, instilling confidence in your ability to navigate future challenges and, in turn, alleviate the stress of disasters for both clients and staff. Be prepared for what lies ahead – your agency's future resilience depends on it.



Strategic Selection: Navigating the AI Landscape in Independent Insurance Agencies for Meaningful Progress



Panel: Kevin Wheeler, Tracy Knight, and others

Track: Operational Excellence

In contrast to typical AI seminars or panels, our session goes beyond merely exploring the latest trends and applications of AI in independent insurance agencies. We aim to facilitate an honest and open dialogue about the critical considerations in selecting AI technology. In today's industry landscape, countless companies, tools, and experts boast about the transformative power of the newest AI solutions—promising to revolutionize work, eliminate redundancy, and enhance various aspects of operations. However, we pose a crucial question: Is this just the latest magic wand?

In this panel discussion, we invite you to embark on an engaging exploration of the innovative tools available in the market. Yet, our focus extends beyond the excitement of discovering these tools. Let's delve into a candid conversation about what truly matters—the specific goals of your agency and how AI tools can accelerate your progress toward achieving them. What is your agency's mission, and how do these tools shape or reshape that mission?

We understand that the effectiveness and responsible integration of AI into your agency's vision are paramount. Therefore, we encourage you to join us in this discussion, where we will collectively address how these tools align with your agency's objectives. Let's not only explore the fascinating possibilities but also consider how to strategically incorporate AI to fulfill the unique vision and mission of your agency. Your participation will contribute to a meaningful conversation about navigating the AI landscape and ensuring that the technologies you choose align with the aspirations and values of your agency. Join us, and let's discuss the path forward together!



Leverage the 80/20 Method to Wow and Retain Top Clients



Presenter: Tammy Wickard

Track: Operational Excellence

Join us for a concise and powerful session on leveraging the Pareto Principle to transform your client base and supercharge your bottom line. Tammy Wickard, a top Advisor with Angela Adams Consulting, will show you how to strategically identify and leverage the top 20% of clients driving 80% of your revenue. She'll provide real-world examples and provide you with tools to overcome common challenges. You'll learn the significance of implementing management initiatives such as setting client-centric goals, leveraging targeted segmentation, and optimizing resource allocation. We'll fearlessly address common issues leading to client loss, including the concept of benign neglect and its implications on client retention. Understand how employee dynamics, shaped by personality types and time management habits, directly impact profitability and discover strategies to align employee strengths with client needs. Leave this session with actionable steps and practical guidance for client profitability analysis and establishing client engagement protocols. Don't miss this opportunity to reshape the future of your agency, leveraging the 80/20 Method for unparalleled success.

