



Fearless Leadership Case Study: Bankers Insurance

"Courage is a heart word. The root of the word courage is cor - the Latin word for heart. In one of its earliest forms, the word courage meant to speak one's mind by telling all one's heart. Over time, this definition has changed, and today, we typically associate courage with heroic and brave deeds. But in my opinion, this definition fails to recognize the inner strength and level of commitment required for us to actually speak honestly and openly about who we are and about our experiences -- good and bad. Speaking from our hearts is what I think of as ordinary courage." Brene' Brown

When we first met Marshall Fleming, CEO of Bankers Insurance, he was doing one of the things he does best ... thinking ahead. Having successfully led Bankers Insurance to becoming Virginia's second largest private insurance agency and expanding to 25 locations across multiple states, he was not only thinking seriously about the organization's future but also his own leadership legacy.



Marshall was energized about the tremendous amount of opportunity over the next few years and the potential to meet some of his loftiest professional goals before thinking about retirement. However, he was keenly aware that to transcend to the next level, it would require more than an increase in sales ... it would require transformational change in the way Bankers Insurance approached leadership capacity, creative collaboration and execution of strategy. It would also require change in himself... he needed to get serious about knowledge transfer and empowerment, to create the space for other leaders to develop and shine and to focus his energy on strategic growth.

Through a referral from one of his Board members, he reached out to Catch Your Limit, seeking a consulting partner that could look at the big picture, develop a customized leadership development program, facilitate momentum and ensure that the time he and his team invested would deliver exceptional value in return.

In our first year, we began by assessing the leadership needs of the organization and developed an annual program structure, curriculum, and retreat calendar. We spent a significant amount of time working with the leadership team to strengthen cohesiveness and ensure alignment. Once they were galvanized, we extended the program to include the next level of leaders. The BI Management Team is a group with lots of tough questions and great ideas and eager for development and more responsibility.

In our second year, we were also asked to facilitate BI's three-year strategic planning process. Since that time, BI has engaged us to serve as a catalyst for leadership development, conduct regular assessments to clarify short- and long-term needs, share resources, facilitate important discussions pertaining to their strategic goals and offer 1:1 counsel as needed. As a result of their team's focus on strategy and development, Bankers Insurance is well on their way to meeting their strategic growth goals.



Fearless leadership is far reaching and doesn't follow a well-worn, direct path. There are three characteristics of the BI team that shine some light on their success.

1. They were courageous when faced with the inevitable "death wobbles" that come along with leadership, growth and change.

As Jeep owners, we love adventure, pushing the bounds, exploring, getting a little dirty and feeling free. But, there's a downside to owning a Jeep ... it's called the "death wobble" (a well-documented defect in Jeeps and other 4wd solid front axle vehicles).

Imagine you are behind our Jeep on the interstate and we start bumping all around like a shopping cart with a bad wheel. It looks a bit scary, you give us some space so that we can slow our speed and make it off the road and in most cases, everything is going to be ok. But, from the driver's perspective, it is horrifying. With no notice, the Jeep starts to violently shake and you feel as though the whole vehicle will come apart and you'll be left holding the steering wheel while all the other parts and pieces vibrate off and away across all lanes of traffic. When this happens, it requires you to accept that you have absolutely no control to stop the situation and the best you can do is be calm, be clear headed and navigate the vehicle to a point of safety when you have the opportunity based on the external conditions such as traffic and space to pull off the road.

We think the "death wobble" is a good analogy for how leaders must feel when they decide to do something radically different and let go of the notion of and need for control. It is in these moments, that we guide leaders to be calm, clear headed and recognize that the brief tumult will be worth it.

When BI's leaders came to these "wobbles," we encouraged them to look at these inflection points as applied learning opportunities and to utilize the leadership skills and tools we had provided, to speak their hearts, be vulnerable, have the hard conversations and ask the tough questions. By doing so, they forged stronger trust, became more confident, faced and resolved more and more conflict and challenges, created innovative new approaches and were rewarded with significant accomplishment.

2. These leaders have heart and are not just going through the motions.

Over the years, we have developed personal relationships with the management and leadership team members. We admire their hearts. They are genuinely good people who work hard to do the right thing and consistently live their values. We see how they "go the extra mile, show empathy and express sincerity" with their clients and each other.

They are also relentless in combating complacency. They are laser focused on their strategic plan and making necessary adjustments in implementation and prioritization. And, we appreciate that they're not just going through the motions. They are fully engaged and invested in leading the organization, becoming better leaders and growing more leaders.

3. This fish didn't stink at the head.

"Fish stink at the head" is an old fisherman's saying and it has held true in this business of leadership consulting. As the leader of Bankers Insurance, Marshall isn't perfect; none of us are and he doesn't declare himself to be. However, anyone who has worked for Marshall knows that he wants what is best for the organization and his team, doesn't accept anything less than your best effort and expects results to be delivered expediently. We can attest to it.



His leadership of our engagement is one to emulate if you want to get the most return on your investment. Rather than just expressing lofty expectations, appearing at the start of the engagement and then vanishing or relegating the endeavor to a "check the box" opportunity. Marshall does the work, he shows vulnerability first, he makes the time, he commits the resources, he makes it clear that leadership development is a priority for himself and the entire organization. And, he doesn't just do these things one time, he is consistent over the long haul.

Our work with the entire Bankers Insurance team has been meaningful and rewarding. They are a testament to the power and potential of fearless leadership.

Let this be the moment you listen and lead from your heart.

"Our work with Catch Your Limit helped serve as a catalyst for positive change. Our focus on strategy and development is paying off. We have felt pride in our personal and professional growth. I believe that this organization is better equipped to weather the tides of change, including leadership succession when that day comes. It is for all those reasons that I would recommend Catch Your Limit to other leaders looking to align leadership, improve communication and grow leadership capacity."

- Marshall Fleming, President & CEO

"During the time we have been working with Catch Your Limit, we have received many benefits. The Leadership team was afforded the opportunity to learn new communications skills that had been lacking in the past. There were missed communication opportunities between the Leadership Team and the Management Team, where the Management Team did not feel comfortable discussing pain points. Over the course of this period, we have been able to bridge the communications gap and the dynamics of working together for the good of the company has changed drastically. This work has allowed us to take a step back and develop stronger relationships with one another and to have those crucial conversations that in the past were avoided."

- Jeff Brugh, CFO

"Working with Catch Your Limit has proven to be a great experience for me personally, as well as for our team. At the start of our meetings there was some inhibition to speak up & trust each other and the process. In a short period of time, with Catch Your Limit's facilitation and guidance, it was evident that they were engaging us and leading us through some difficult conversations. Soon we came to realize our own personal strengths and talents, but more importantly those of the team and its members. We developed a cohesiveness and understanding that those individual talents make for a very strong Leadership & Management team. This has enabled us to have focus and goals with the knowledge that we all have the commonality in making Bankers Insurance the agency of choice for our clients and our employees."

- Sherry Dodd, Vice President - Regional Operations

"Our leadership team does not let the 'elephant in the room' get ignored despite how uncomfortable it may make the situation. By Melissa and Tom teaching us how to use positive conflict resolution, each team member feels 'safe' to address any situation, making it easier for our organization to move forward and to grow. That elephant doesn't stand a chance with our courageous leadership team!!!"

- Reta Belk, Vice President - Acquisitions and Special Projects