

Harvest Moon Consulting

Cultivating Success

Client Centric • Collaborative • Service Excellence • Integrity

About Us

Harvest Moon Consulting (HMC) provides marketing, content, and growth support built specifically for insurance organizations. We work with MGAs, program administrators, carriers, and founders who need marketing that reflects how insurance actually operates—not surface-level campaigns or disconnected tactics.

Our approach is grounded in insight, integrated execution, and long-term value creation. We help organizations clarify their story, strengthen leadership visibility, and bring structure to their growth efforts—whether that means launching new programs, supporting capacity conversations, equipping distribution partners, or building consistent market presence.

HMC blends strategic thinking with hands-on execution. From thought leadership and digital marketing to program launch support and executive positioning, our work is designed to align with underwriting discipline, operational realities, and relationship-driven growth. Every deliverable is created to support real conversations, informed decision-making, and sustainable scale.

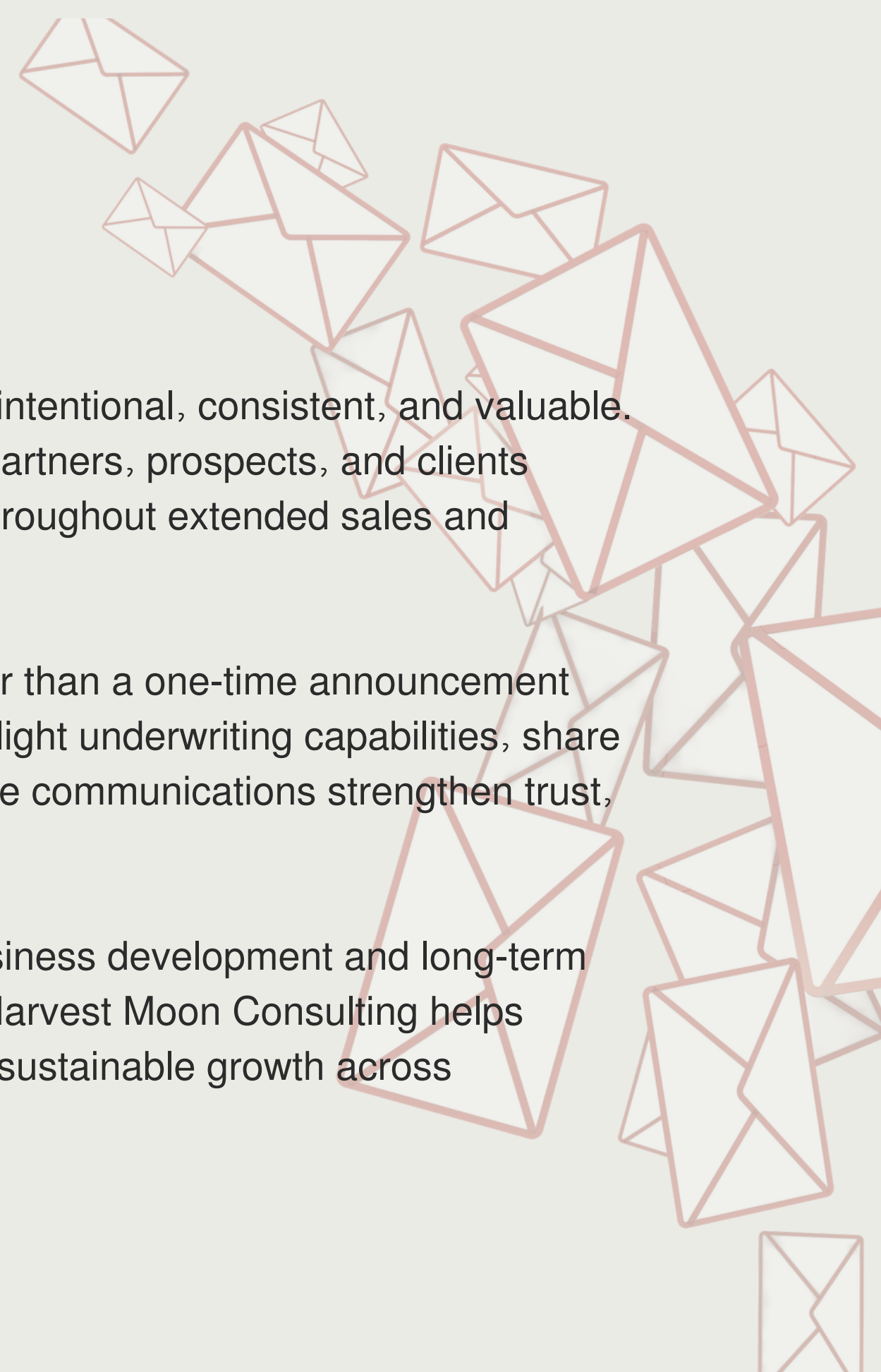
We operate as a true extension of your team—discreet, practical, and deeply aligned with your business objectives—helping you invest in marketing that earns trust, reinforces credibility, and supports growth over the long term.

Emails

In industries built on relationships, credibility, and long decision cycles, communication must be intentional, consistent, and valuable. Email marketing remains one of the most effective tools for nurturing relationships with agency partners, prospects, and clients because it allows organizations to communicate directly, reinforce expertise, and stay present throughout extended sales and partnership timelines.

At Harvest Moon Consulting, email marketing is approached as a strategic growth channel rather than a one-time announcement platform. Thoughtfully designed email programs help organizations educate their audience, highlight underwriting capabilities, share insights, and maintain ongoing engagement with distribution partners. When executed well, these communications strengthen trust, clarify value propositions, and keep organizations top-of-mind when opportunities arise.

Our email marketing strategies focus on structured, purposeful communication that supports business development and long-term partnerships. By combining clear messaging, consistent voice, and audience-focused content, Harvest Moon Consulting helps organizations create email programs that nurture relationships, reinforce expertise, and support sustainable growth across partnerships.





Cultivating Success



Succession Planning: A Crucial Step in Talent Management

A successful talent management program requires a comprehensive approach to the entire human resource lifecycle. This lifecycle begins by aligning talent needs with business objectives. The need to hire new talent may arise from business growth or the departure of current employees. When a critical employee leaves, finding a suitable replacement can take time and potentially disrupt business operations. Therefore, it is essential to proactively plan for talent gaps, which is the foundation of succession planning. The talent management team should consider the following key factors when developing a succession plan:

- [Identifying Critical Talent Gap](#)
- [Integrating Succession Planning into Strategic Planning](#)
- [Aligning Succession Planning with Company Culture](#)
- [Taking a Proactive Approach to Succession Planning](#)

For further information on building a robust succession plan, please contact Harvest Moon Consulting at info@hmc-llc.com or call us at 317-296-7514.



As MGAs continue to navigate rising carrier expectations, tighter reporting requirements, and increasing pressure around data quality and operational discipline, it is clear that the organizations that thrive in 2026 will be those that build scalable, integrated, well-documented operations.

HMC's 4I framework provides MGAs a practical approach to strengthen delegated authority operations. The 4 I's define what it takes for MGAs to grow sustainably, secure capacity, and deliver consistently clean data and performance results. Implementing the 4I's requires an intentional effort to build the right processes, documentation, and technology foundation to support growth.

HMC supports MGAs in applying the 4I framework across core execution disciplines through:

✓ **Optimizing Processes & Platforms**

Defining configuration requirements and aligning workflows while establishing clear SOPs, underwriting guidelines, and audit-ready operational documentation.

✓ **Project Management**

Bridging technology, underwriting, and operations to reduce execution gaps, minimize rework, and support scalable, repeatable launches.

✓ **Technology - Data Integration**

Connecting systems, processes, and people to improve data quality, ensure reporting consistency, and deliver reliable, carrier-ready data flows.

✓ **Training- Change Management - Staffing Support**

Driving consistent adoption by equipping teams to successfully implement new systems and processes that support long-term, sustainable operations.

For more information on how HMC can support your growth roadmap with the 4I framework, email us at info@hmc-llc.com or give us a call at 317-296-7514.

Contact us today to learn more about our services

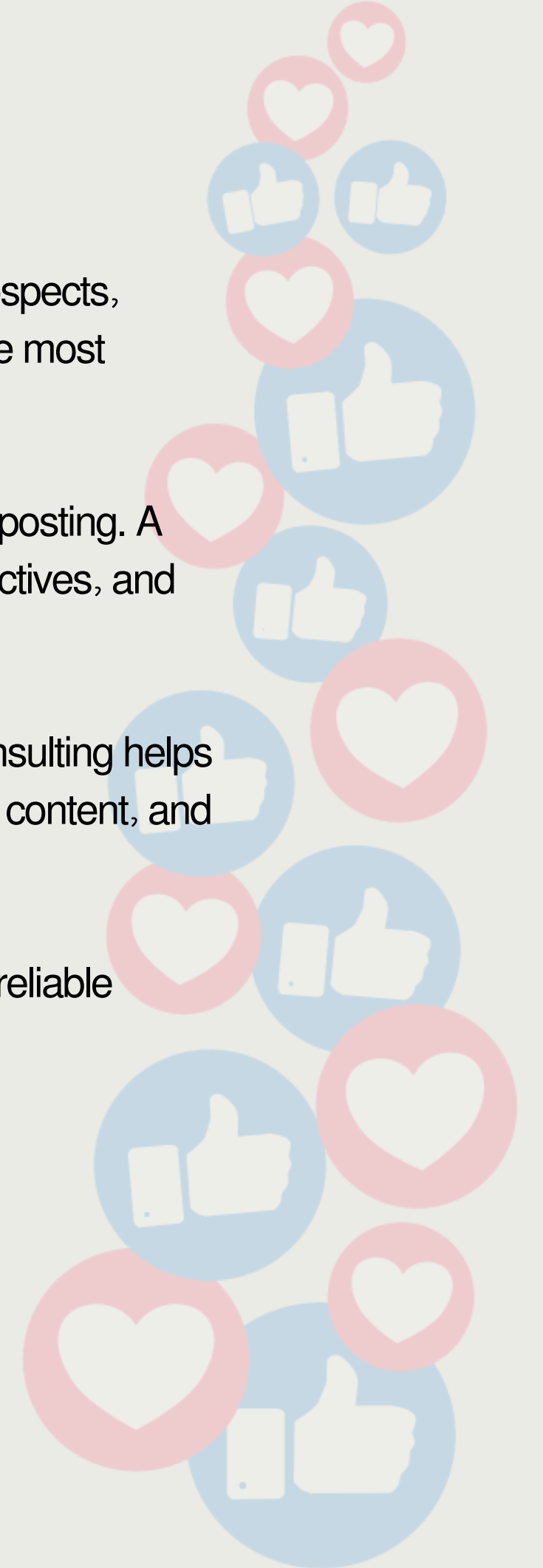
LinkedIn Post

In today's professional landscape, organizations are evaluated long before a conversation or opportunity formally begins. Prospects, partners, investors, and industry peers often form their first impressions through digital presence—making LinkedIn one of the most important platforms for establishing credibility and market relevance.

At Harvest Moon Consulting, LinkedIn content is treated as a strategic communication channel rather than occasional social posting. A structured LinkedIn content strategy allows organizations to consistently communicate expertise, reinforce leadership perspectives, and remain visible within the professional communities that influence growth and partnership opportunities.

Through planned and consistent content—including posts, carousels, and executive thought leadership—Harvest Moon Consulting helps organizations develop a strong voice that aligns with their market position. This approach blends industry insight, educational content, and perspective-driven commentary to create meaningful engagement with agency partners, clients, and stakeholders.

The result is a LinkedIn presence that strengthens credibility, builds trust over time, and positions organizations as informed, reliable voices within their industry.



LinkedIn Post

As MGAs continue to face increasing operational complexity, reporting expectations, and capacity scrutiny, many leaders are exploring how AI can be applied practically and responsibly—without disrupting core operations.

We have published a new blog that builds on our 4 I's framework (Innovation, Informed, Integration, Invest) and outlines where AI can realistically support MGA operations and growth.

To learn more about How AI Can Enhance MGA Operations and Growth — Through the 4 I's follow the link below or contact one of our experts at info@hmc-llc.com or give us a call at (317) 296-7514.

[#HMC](#) [#AI](#) [#insurance](#) [#insuranceconsulting](#) [#consulting](#) [#MGA](#)
[#MGAINsurance](#)

How AI Can Enhance MGA Operations and Growth



Innovation: Accelerating Operations and Competitive Advantage

When applied appropriately, AI helps MGAs embed innovation into daily operations—turning operational strength into a sustained competitive advantage.



Informed: Turning Data into Actionable Insights

AI strengthens data discipline and insight generation—reinforcing trust with carriers and supporting sound decision-making.



Integration: Connecting People, Processes, and Systems

Embedding AI into integrated workflows promotes consistency and transparency—both critical to long-term MGA success and carrier confidence.



Invest: Enabling Smarter, Scalable Growth

Strategic adoption of AI enables MGAs to invest in scalable processes and operational maturity—supporting sustainable growth over time.



LinkedIn Post

Most insurance organizations don't have a marketing problem. They have a clarity problem.

Distribution materials exist. Launches happen. Emails go out. Yet adoption stalls, not because the product is weak, but because the message is fragmented across teams, channels, and timing.

When marketing, underwriting, operations, and distribution aren't aligned, frontline teams must figure things out on their own instead of following a clear plan.

Harvest Moon Consulting enables insurers to develop coordinated processes that connect strategy with execution. We work alongside leadership teams to align information flow with operations through targeted assessments, process mapping, data and reporting integrity, distribution and marketing strategy, and enabling technology. The result is executable workflows that improve ROI, strengthen distribution relationships, and support sustainable, scalable growth.

#MGA #HMC #Marketing #insurance #communications

Why Insurance Marketing Often Fails to Support Growth

Why insurance organizations struggle to turn marketing into measurable growth.



Marketing Is Disconnected from Distribution Strategy

Marketing is activated after products are launched or after growth targets are set, rather than being integrated into distribution planning. This leads to information breakdown between you and your producers.



Agency Communication Is Inconsistent

Different regions, wholesalers, or executives communicate different appetite, priorities, and value propositions.

Launching products without aligned communication creates friction in the field.

Producers should never receive positioning late or inconsistently.



Distribution Enablement Is Treated as Collateral, Not Infrastructure

Appetite guides, product summaries, and positioning materials are created once and not maintained.

Static documents fail to keep ongoing communication with producers relevant and consistent.



Policyholder Communication Is Overlooked

Most marketing plans focus heavily on new business and not on existing accounts.

When an organization fails to market to existing accounts, they miss the growth opportunity of retention, cross-selling, and account rounding.



Execution Lacks Continuity

When you market without a sustained communication plan, conference-related outreach, website updates, or email campaigns fall short.

Confidence within distribution develops over time through consistent engagement, not isolated initiatives.



LinkedIn Post Holiday

Holiday posts on LinkedIn may seem simple, but they play an important strategic role within a consistent marketing and posting service.

Regular holiday posts help organizations maintain visibility during periods when industry news or announcements may be limited, ensuring the brand remains active in the feeds of agents, brokers, and partners.

As part of a structured posting strategy, holiday content supports algorithm consistency, encourages engagement, and helps maintain steady communication, keeping the organization on top-of-mind with its distribution partners and broader professional network.





Blogs

In complex industries, expertise is not simply claimed—it is demonstrated through insight, perspective, and the ability to clearly articulate market realities. Long-form content provides organizations with the space to explore ideas, explain industry dynamics, and communicate a thoughtful point of view that shorter formats cannot always achieve.

At Harvest Moon Consulting, blog and long-form content strategies are designed to position organizations as informed contributors within their industry. Insight-driven articles allow companies to address emerging trends, clarify complex topics, and share perspectives that resonate with agency partners, clients, and other key stakeholders.

Rather than producing content for volume, the focus is on meaningful, well-structured pieces that reflect real industry challenges and opportunities. These articles help reinforce credibility, support executive thought leadership, and provide valuable resources that can be shared across marketing channels.

When consistently developed and thoughtfully distributed, long-form content becomes a powerful tool for reinforcing expertise, strengthening brand authority, and contributing to ongoing industry conversations.



Developing Leadership Pipeline

Building on my previous post about succession planning, this article will highlight successful strategies for nurturing an internal leadership pipeline. Focusing on developing leaders from within the organization boosts morale, increases engagement, capitalizes on existing cultural knowledge, and facilitates a more efficient transition during succession planning.

Here are some successful strategies for developing your internal leadership pipeline:

1. **Identify Potential Leaders Early:** Identify leadership potential using assessments such as performance reviews, 360-degree feedback, and peer evaluations. This process ensures that organizations have a continuous flow of skilled, capable leaders who are ready to guide the company to future success.

2. **Leadership Development Programs:** Leverage organizational leadership competencies to develop customized training, mentorship, and executive coaching initiatives. These leadership programs are vital for nurturing and retaining high-caliber talent, allowing organizations to stay agile and competitive while preparing for future challenges.

3. **Develop a Culture of Accountability & Innovation:** Create an environment where employees take ownership of their projects, initiatives, and mistakes. Leadership accountability is essential for building trust, transparency, and responsibility, which in turn encourages innovation. When individuals feel empowered and accountable, they are more likely to take creative risks and propose new ideas, driving both personal and organizational success while ensuring long-term sustainability and growth.

4. **Encourage a Strategic Mindset:** Encourage potential leaders to move beyond everyday responsibilities and focus on overarching goals and strategies. By fostering strategic thinking, leaders gain the ability to think critically, make decisive choices, and inspire their teams through a clear and motivating vision.

5. **Recognize and Reward Leadership Behaviors:** Acknowledge internal leaders who demonstrate strong leadership qualities, offer promotions or other incentives to employees who show strong leadership potential. Recognizing and rewarding leadership behaviors encourages employees to develop their leadership skills, align their efforts with organizational goals, and ensure that the company is continually nurturing talent that can drive future success thus, building a sustainable leadership pipeline for the future.

How AI Can Enhance MGA Operations and Growth

In our previous discussion, we explored how MGAs can thrive using the 4 I's—Innovation, Informed, Integration, and Invest—to secure capacity, grow sustainably, and operate with excellence. As the delegated authority market evolves, artificial intelligence (AI) has emerged as a valuable tool to support operational efficiency, enhance decision-making, and scale effectively across underwriting, reporting, and core workflows.

To realize its full potential, AI must be applied thoughtfully across MGA operations—supporting efficiency, generating actionable insights, and enabling scalable growth.

Innovation: Accelerating Operations and Competitive Advantage
Innovation is the engine that sets leading MGAs apart. AI can enhance innovation by:

- Automating workflows to reduce manual effort, errors, and processing time.
- Supporting underwriting discipline through analytics that identify trends and emerging risks.
- Enhancing bordereaux and regulatory reporting processes by improving data consistency and timeliness.
- Providing decision-support tools that help staff work more efficiently and consistently.

When applied appropriately, AI helps MGAs embed innovation into daily operations—turning operational strength into a sustained competitive advantage.

Informed: Turning Data into Actionable Insights

Being informed means making decisions based on accurate, timely, and well-governed data. AI enhances this capability by:

- Identifying trends and emerging risks across complex datasets.
- Applying AI-driven analytics to inform dashboards and reporting for underwriting, claims, and portfolio performance.
- Supporting predictive insights that help MGAs proactively adjust appetite, pricing, and guidelines.
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Used correctly, AI strengthens data discipline and insight generation—reinforcing trust with carriers and supporting sound decision-making.

Print Material (Branding)

Industry conferences and events create valuable opportunities for organizations to connect with partners, strengthen relationships, and expand visibility within their market. However, the impact of these events depends heavily on preparation, clear messaging, and thoughtful follow-through. Without coordinated materials and a structured approach, valuable opportunities for engagement and relationship-building can be missed.

At Harvest Moon Consulting, conference and event marketing support focuses on ensuring organizations present a clear, professional, and consistent presence before, during, and after each event. This includes developing coordinated materials such as booth messaging, supporting collateral, digital communications, and post-event follow-up that reinforce the organization's expertise and value proposition.

By aligning event materials with broader marketing and distribution strategies, organizations can turn conferences from isolated appearances into meaningful engagement opportunities. The result is stronger visibility, more productive conversations, and continued relationship development that extends well beyond the event itself.

About Us
Harvest Moon Consulting, a subsidiary of Harvest Moon Holdings, LLC, is based in Wisconsin. Our team offers a wide range of services tailored to support business growth and development.

Our Mission
Our mission is to transform organizations with our tailored consulting solutions focused on organizational growth and client excellence.

Core Values

- ✓ Client-Centric
- ✓ Collaborative
- ✓ Service Excellence
- ✓ Integrity

Our Services
We offer tailored insurance consulting services to help our client's meet their business goals and expectations. We are committed to excellence and delivering high-quality solutions that exceed client expectations.

Mergers & Affiliations
We offer due diligence services and change of management support, to ensure a seamless transition.

Project Management
Professional project management services offered in the areas of information technology solutions, and business process improvement to optimize organizational efficiency.

Process Documentation
We specialize in creation and implementation of standard operating procedures, and manuals to ensure efficiency and clear guidance across your organization.

Employee Development
We offer comprehensive training, targeted improvement strategies and structured mentorship programs designed to enhance skills, boost productivity and foster professional growth.

Strategic Planning
We help businesses develop and implement business strategies with customized plans that deliver measurable results.




Cultivating Success
(317) 296-7514
info@hmc-llc.com
www.harvestmoonholdings.com/services/
2810 Crossroads Drive Suite 4000
Madison, WI 53718
A Harvest Moon Holdings Company

THE HARVEST MOON CONSULTING DIFFERENCE

Phase I
In phase I, we conduct an analysis of the current structure and policies of the organization. Our analysis consists of:

- Discovery/Initial Assessment
- Planning/ Strategy Development

Phase II
Phase II consists of in person or virtual consulting sessions, as well as project management oversight to ensure successful implementation of the Phase I plan through our implementation support staff.

Phase III
To ensure our client's organization success, we provide post implementation performance analysis and ongoing monitoring. Our post implementation monitoring includes:

- Performance metrics gathering and analysis
- Recommendations for future actions based off organization performance

Contact Us
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info@hmc-llc.com
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Suite 4000
Madison, WI 53718



CULTIVATING SUCCESS

Turn MGA Operations into a Growth Engine with the 4 I's

In a market defined by heightened scrutiny, complex reporting, and rising expectations, the 4 I's—Innovation, Informed, Integration, and Invest—provide a clear framework for operational excellence.

Harvest Moon Consulting (HMC) helps MGAs put this framework into action.

How HMC Supports MGAs

Training - Change Management - Staffing Support

- Driving adoption and operational consistency
- Preparing teams for new systems and processes
- Supporting long-term sustainability

Project Management

- Bridging technology, underwriting, and operations
- Reducing execution gaps and rework
- Supporting scalable launches

Technology - Data Integration

- Connecting systems, processes, and people
- Improving data quality and reporting consistency
- Supporting reliable, carrier-ready data flows

Optimizing Processes & Platforms

- Define configuration requirements, workflows, and carrier alignment
- Establish SOPs, underwriting guidelines, and clear roles
- Prepare audit-ready, operational documentation

Learn more about the 4 I's framework and how HMC helps MGAs achieve operational excellence on our blog at www.harvestmoonholdings.com/services



Harvest Moon Consulting 2810 Crossroads Drive Suite 4000 (317) 296-7514 info@hmc-llc.com
Madison, WI 53718

Flyers Brochures

Flyers and brochures are essential tools for clearly and concisely communicating key information in a format that is both tangible and easy to share. In the insurance industry clarity, credibility, and quick understanding matter; well-designed materials help summarize products, highlight differentiators, and support conversations with prospects and partners. Whether used at events, in virtual communications, or as leave-behinds, they reinforce brand professionalism and ensure that your message is communicated consistently, even after the initial interaction.



Tradeshow

Promotional items such as shirts, pens, and chip clips serve as practical, everyday reminders of your brand long after a tradeshow ends. In busy event settings, these items help attract attention and create a memorable, approachable touchpoint that encourages engagement. When thoughtfully selected and aligned with your brand, they extend visibility beyond the event, keeping your organization top-of-mind in a subtle but consistent way as recipients incorporate them into their daily routines.

Promotional Video

Promotional videos serve as dynamic, story-driven touchpoints that bring your brand to life in a way static content fails to. In crowded digital spaces, video captures attention quickly and communicates your message with clarity, personality, and emotion.

When thoughtfully produced and aligned with your brand voice, promotional videos create a memorable experience that resonates with your audience and encourages engagement. Over time, they continue to build familiarity and trust extending your reach across platforms and keeping your organization top-of-mind through compelling, easily digestible content.



If you would like to view our promotional video follow the link: [Harvest Moon Consulting](#)

CONTACT US

571 Monon Boulevard, Suite 200

Carmel, IN 46032

Email info@hmc-llc.com

Phone (317) 296-7514

 @harvest-moon-consulting

 www.harvestmoonholdings.com