

family business practice

Interview with James Godsall, MD at Jukes Insurance Brokers

Jukes Insurance is a West Midlands-based Insurance Broker that offers independent Personal Insurance and Commercial Insurance advice. This was an independent interview with James Godsall MD about the business development programme delivered in 2020 by Peter Roper Founder of the Family Business Practice.

The Challenges

James, why did you initiate this programme?

Jukes Insurance had a couple of challenges we wanted to overcome:

1. Coming back together as a stronger team. Working remotely was a big change, as previously the whole team had been in the same office together. With Covid security in place, the team were back in the office for limited times, with the majority of their time spent working from home. The training was used to explore how to come back together and stay connected whilst, as an organisation, using our time more effectively.
2. Developing our communication with clients to be as effective as possible. Previously in our world, there was a mixture of face to face consultation and phone calls. With Covid secure working this has now become more phone-based. The team were missing their quick, informal chats done by poking a head around an office door. The training was an opportunity to step back, review what they were already doing well and tweak things so that the team become the best they can be.

The Solution

Why Peter Roper and the Family Business Practice?

We chose to work with Peter Roper to deliver an ILM program (Institute of Leadership & Management), funded through BDM.

Peter was chosen for 2 reasons: trust that he had a good understanding both of the insurance industry and family and multi-generational businesses.

Many of the staff at Jukes have worked there for more than 15 years, so it is one big family. From various discussions over the last 11 months, we knew that Peter had this understanding, so he wasn't coming into the business 'cold'. The value in using Peter, as an external trainer, was that he was removed from the business, bringing an external perspective into the room and free to pose the odd 'difficult' question.

family business practice

The Method

Because it was impossible to shut down the business for training with everyone present, we agreed to run 2 sessions on the same day, once a week, over 4 weeks. This also meant that people could keep to the same groups but could be moved between groups if necessary.

All the sessions were just 72 minutes long so short, sharp, and timely!

This flexibility worked really well for the team and allowed us to do some training together as a team, in contrast to our usual individual training sessions. Most of our usual training is to keep everyone up to date with the latest regulation and technical changes, which is very different. Often it is done online and by individuals working at their own pace. Training as a team was very different and everybody enjoyed it.

A lot of the training started with what people are like as individuals and how they fit into the business and with clients. There was value in asking yourself “probing” questions and taking a bit of a step back to reflect on this.

The whole team took at least one point away every week to try. These sessions were the start of ongoing conversations, we were not looking for everything to be completely resolved after each session.

The Outcomes

There were a couple of immediate benefits which proved really helpful.

For example, we had some great discussions about what each individual value and their accountability to others. During lockdown, things like appraisals and setting objectives had slipped and this was a helpful and timely reminder for everybody.

Other discussions centred on how the team communicates with clients and whilst many agreed that everybody should treat clients as they themselves would want to be treated, not every client is the same. Some prefer relationship-based styles whilst others are more transactional.

For the directors, this proved useful as a reminder of our ongoing strategy as a relationship-based business and the need to keep to Jukes’ strengths in business.

Jukes has just finished a financial year and we were starting to focus on the period up to Christmas and for the next financial year. It was a good reminder as lockdown had felt more chaotic and people have worked very hard ‘chasing too many rabbits.

For me personally, it was a time to reflect and step back from chaos - I was in a better place, a good headspace, for a couple of hours each week.

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The discussions were really useful for allowing us to reflect on our core values and to have more discussions that we would not have naturally. Because people are always very busy, it is difficult to step back and challenge ourselves in terms of longer-term structure.

Our regular team meetings have been used to carry on the discussion and were treated as the start of a conversation.

The Conclusions

Aside from Peter being an Aston Villa supporter, he is very good at what he does. We had some feedback from everyone after the first session and he adapted the program to suit us better. It is more difficult to deliver training on Zoom and we didn't pick up in the first session that one team member felt a little uncomfortable in that first week. To Peter's credit, he listened to this feedback and tweaked his approach.

As an experienced trainer myself, I know it is almost impossible to have an approach that works for everybody but the feedback I had from everyone who took part was very positive.

I wouldn't hesitate to use Peter again and would recommend him to any family business like our own. He really gets that world and brings something to it. He has gone through the same journey as me - from working in a large corporate to running a family business - and knows the challenges involved.

James Godsall Managing Director Jukes Insurance