Cottingham & Butler
C&B Insurance | SISCO | HealthCorp | Safety Management
Established 1887

University of Wisconsin Whitewater
College of Business and Economics
Department of Marketing

UWW AMA Regional Conference 2025

Cottingham & Butler Gatekeeper Competition

Introduction

Role: You are an Insurance Consultant for **Cottingham & Butler** in the Risk Management Division, Based in Dubuque, IA, with additional offices in Wisconsin, Iowa, Illinois, Arkansas, and Texas. Simply put, you're a professional buyer of insurance for your clients. You help large employers protect their most important assets: their people and their business.

Cottingham & Butler overview

As an insurance brokerage firm, Cottingham & Butler doesn't sell insurance directly; instead, they are professional buyers of insurance. Their access to numerous insurance carriers and their expertise, ensures they are getting the best coverage at the best price for their clients.

Today, Cottingham & Butler is recognized as the 4th largest privately held brokerage in the United States. The company prides itself on its core values of integrity and client-centric focus. With over 1,300 professionals strategically positioned across the country, Cottingham & Butler continues to deliver exceptional service and innovative solutions to its clients.

Cottingham & Butler has experienced rocketing growth for the past 20 years. Their ability to grow is not fueled by mergers and acquisitions (buying other companies), they have grown their business by proving their value and continuing to win new clients. Boasting a strong retention rate of 94% across the business, they have built something truly unique in the insurance industry and business are taking note.

C&B's specialization in the manufacturing industry continues to expand. View and use the following resources to learn more.

C&B Manufacturing Brochure Link:
https://www.cottinghambutler.com/_files/ugd/ca6f2b_09636300172b4b3eaf5b336e6991131b.pdf
C&B Manufacturing Webpage Link:
https://www.cottinghambutler.com/manufacturing

Background: After a successful summer internship with Cottingham & Butler, you decided to join the company post-graduation. You have been with Cottingham & Butler for six months, focusing on prospects in the manufacturing industry. C&B's Risk Management manufacturing vertical solely focuses on the risks and major exposures that this industry faces each day. In your first six months, you have become familiar with C&B's entire portfolio of risk management capabilities and services you can provide to this industry.

*The scenario for this role-play and the prospect is fictitious and have been created for this competition's use only. Any Names, Roles, and Other Information on the prospect should not be used outside of this competition

Opportunity: While at a gathering of friends, you found out that one of your friend's significant other, Riley, has started a new role with Atlas Manufacturing Corporation as an assistant to Quincy Jones, the Risk Management Director at the Atlas Co.

This is a company that is in your industry focus/vertical. Based on your past research, they would be a strong candidate based on their revenue, number of locations, and total employees. You have been trying to get an appointment with a decision maker at this firm for some time now, using LinkedIn, sending emails, talking to and dropping off information with the receptionist, and leaving voice mails to various potential decision-makers, but to no avail.

Your newfound friend, Riley, said they would be willing to ask Quincy on Monday morning if Quincy would be willing to take your call. Riley texted you on Monday at 10:00 am and said you should call Quincy at 12:30 pm. It read, "Quincy only has 5 minutes to talk to you, and emphasized, no more than that." You thanked Riley and said, "I really appreciate your help. I promise to make it worth Quincy's time.

The Sales Call

You are meeting with Quincy Jones, Corporate Safety Director of Atlas Corporation.

Objectives: In the 5-minute meeting with Quincy, your primary objectives are:

1. **Build rapport with Quincy and determine the decision makers for their insurance needs.**
2. **Identify the needs of Atlas Corporation as they relate to risk management and insurance.**
3. **Give a very brief overview of why Cottingham & Butler would be worth talking to.**
4. **Answer any questions, concerns, or objections Quincy has.**
5. **Secure appropriate contact and follow-up meeting with the decision-maker.**

Prospect Buyer Profile

Your Pre-Meeting Research

Atlas Manufacturing Corporation information from various prospecting sources:

- 3rd generation business and well-established in the space of producing non-critical auto-parts.
- 3 locations in the Midwest – Madison, Milwaukee, and Chicago.
- 275 employees
- $82 million dollars in sales

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- Current P&C Insurance Renewal Date: October 1st, 2024
- Current P&C Insurance Broker: Heins Insurance

Executive Team

- Riley Brooks, Chief Human Resources Officer
- Taylor Morgan, Chief Financial Officer
- Alex Harper, Chief Executive Officer

Prospects Background (From LinkedIn):

Quincy Jones, Corporate Risk Management Director

- 8 years with Atlas Corporation
- 4 years with Johnson Controls
- 2 years with Brady Corp
- Undergraduate from University of Wisconsin – Whitewater, BBA Occupational Safety
- MSP (Master Safety Professional)
- CSD (Certified Safety Director)

Resources

C&B Risk Management Manufacturing Brochure - https://www.cottinghambutler.com/_files/ugd/ca6f2b_09636300172b4b3eaf5b336e6991131b.pdf

C&B Risk Management Manufacturing Case Studies - https://src.cottinghambutler.com/share/FFECF7AF-623E-4A62-AB94606ED3DBA645/

C&B Risk Management Vertical - C&B Manufacturing Page.

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