



**Case Study:**

Jason Goldman  
Co-CEO  
G2 Insurance

**Website:**

[www.g2insurance.com](http://www.g2insurance.com)

**Industry:**

Risk Management &  
Insurance

**Employee Count:**

20-50

## About G2 Insurance

G2 Insurance is a Certified B Corp providing insurance and risk management solutions to nonprofits, asset managers, family offices and UHNW individuals. G2 harnesses a passion for expertise, guiding clients through the process of developing and maintaining a high-quality insurance program to protect both organizations and their people. Together, they find ways to steward resources for the good of both their clients and collective community.

G2 originally utilized Sebastian Lane Consulting to assess and benchmark their team and sales process. The assessment yielded immediate opportunities for growth and creation of systems & processes for sales, especially in the face of COVID-19.

## About Jason Goldman Co-CEO at G2 Insurance

As Co-CEO, Jason Goldman is in perpetual pursuit of improving G2 Insurance. He is a 3rd generation insurance broker and serves on the boards of the Lisa and Douglas Goldman Fund and the Stern Grove Festival Association, contributing his talent for developing creative solutions. He is also an advisory board member at the UC Berkeley Center for Social Sector Leadership at the Haas School of Business.

With G2's foundational commitment to providing quality expertise to clients and community, Sebastian Lane Consulting's belief that the true essence of sales is education resonated with Jason and his team. Sebastian Lane customized a unified sales process to further the core mission of G2, which is to Advise Wisely, Service Extraordinarily, and to Protect Relentlessly.

" Working with Sebastian Lane Consulting has been a game changer. Their knowledge, tenacity, and grit helped us get through this very difficult situation of COVID-19."

Jason Goldman, Co-CEO



"Jason and his team have Subject Matter Expertise that they desperately want shared for the betterment of their clients and partners, which has made our success extremely fulfilling for all involved."

"G2 provides transformative risk management solutions, and Sebastian Lane Consulting helps to deliver the G2 message to an expanding community of clients. The value that we provide to this community makes our partnership altogether rewarding."

- Jesse Mahle  
CEO,  
Sebastian Lane Consulting

## Strategy, Goals and Results

Sebastian Lane Consulting completed a Sales Best Practices Assessment which benchmarked G2's current sales operations and identified areas for potential improvement, creating a roadmap for immediate value. We then created a Proven & Repeatable Sales Process built on G2's core values. G2 already had an outstanding reputation for client service and experience. Working with Sebastian Lane Consulting simply eased G2's ability to facilitate the distribution of their expertise in the face of COVID-19 and beyond.


### Short-term Goals:

- Increase Revenue
- Benchmark Current Sales Platform/Team
- Overcome COVID-19

### Long-term Goals:

- Build a Unified 1G2 Sales Process
- Provide a 5-yr Sales Plan for Exponential Growth
- Increase Predictability of Sales

## The COVID-19 Results

 35% new business sales growth since September of 2020 (date engaged)

 Sales Process increased communication, predictability & sales team bandwidth

 3X EBITDA despite COVID-19 impacts

Ultimately, Sebastian Lane Consulting helped G2 Insurance make significant, sustainable improvements to its growth strategy. Jason has a fantastic Executive Team which has diligently utilized sales insights from Sebastian Lane to fully capitalize on growth opportunities from an operational perspective. Having a reliable source of sales expertise that is in line with their values and ingrained in their company culture has resulted in accelerated goals, streamlined processes and has fast-tracked organizational growth.