



RIGHT START

Training Series

AN AGENCY TOOLKIT TO GROW YOUR
BUSINESS AND GAIN APPOINTMENTS

PART 2

EMPLOYEES, YOUR KEY TO
INCREASED PRODUCTIVITY



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Session Objectives

- ◆ How to Create Written Job Designs
- ◆ Establishing Meaningful & Measurable Goals for Employees
- ◆ Developing Process for Tracking & Reporting Agency Progression



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Share Staff Strengths



Persuasion / Influencing

Problem Solving

Judgment & Decision Making

Written & Oral Communication

Time Management

Active Learning

Active Listening

Social Perceptiveness

Reading Comprehension

Critical Thinking

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Helpful Resources

- Occupational Information Network
- Caliper Profile Testing
- Omnia Personality Profile
- College Career Planning Offices
- Job Placement Services
- Temp Agencies
- Career Fairs



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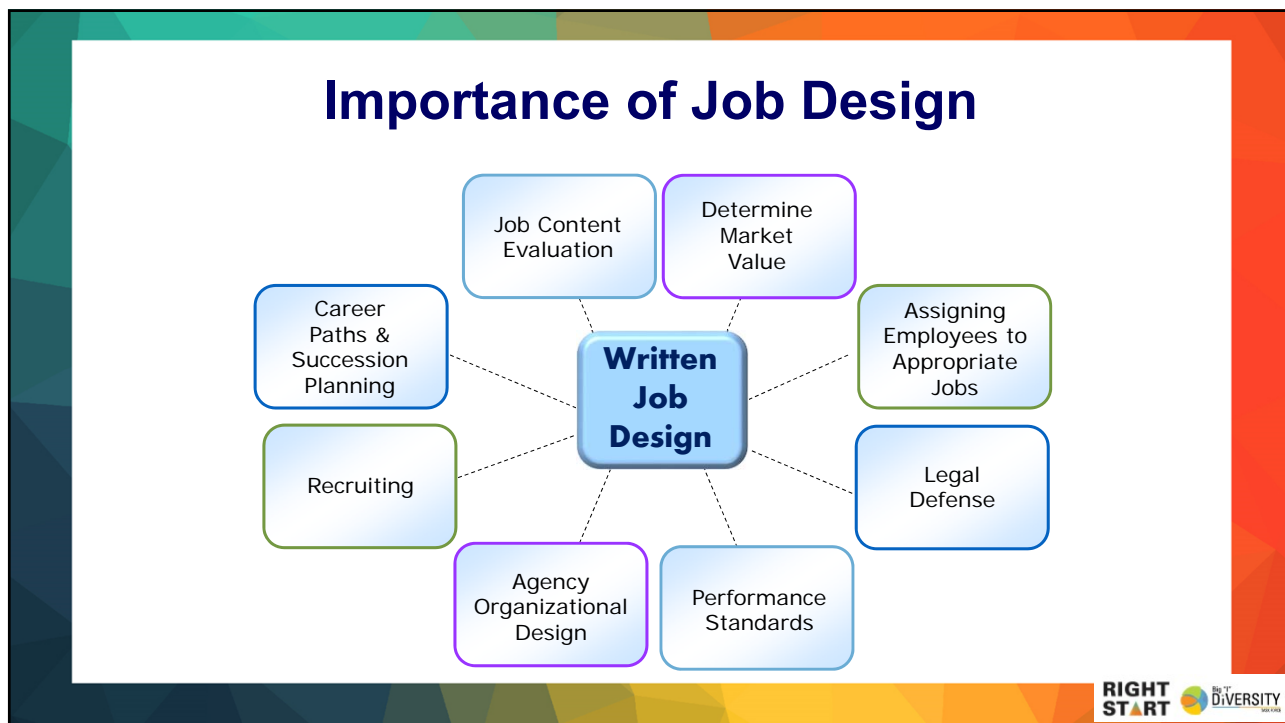
Employee Job Design

- Job Title
- Role of Position
- Main Responsibilities
- Performance Measurement



The slide features a central title 'Employee Job Design' in a large, bold, dark blue font. Below the title, four light blue rectangular boxes are arranged vertically, each containing a component of job design: 'Job Title', 'Role of Position', 'Main Responsibilities', and 'Performance Measurement'. Each box is preceded by a small blue square icon. The slide has a white background with a decorative orange and yellow gradient bar at the bottom. In the bottom right corner, there are logos for 'RIGHT START' and 'DIVERSITY'.

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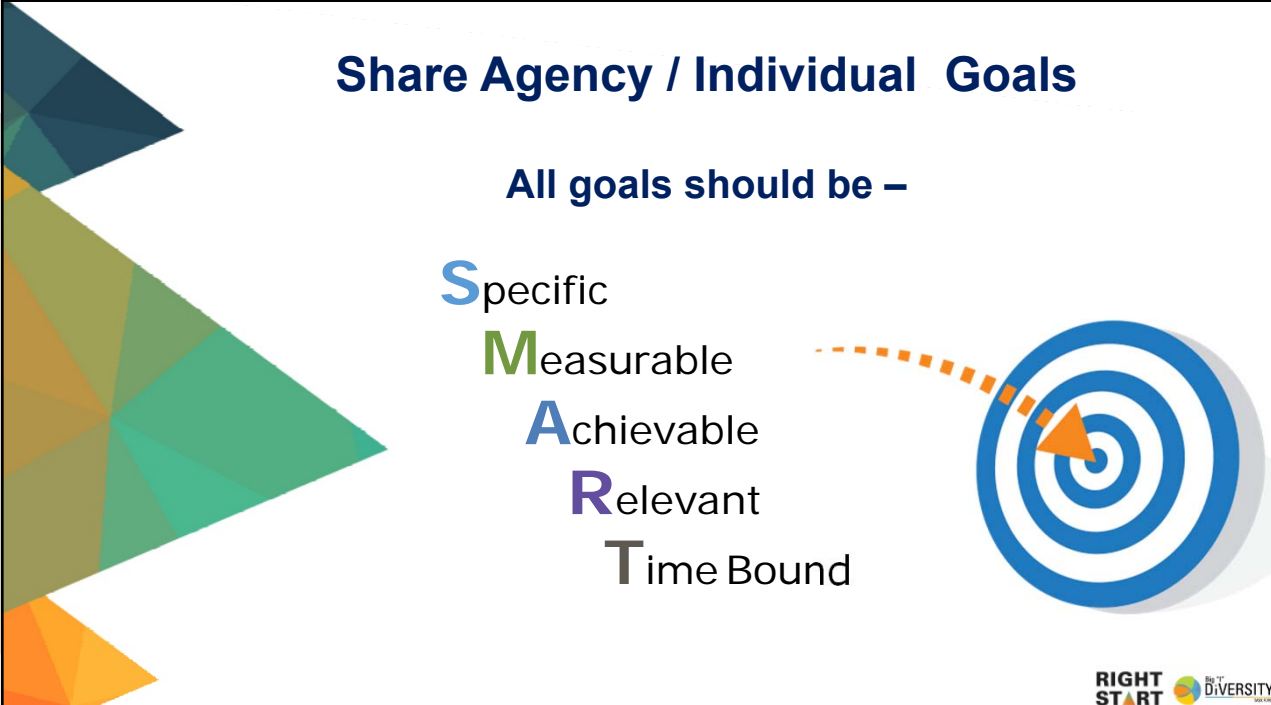


THINK TANK #1
Employee Job Designs

2 MINUTES

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Share Agency / Individual Goals

All goals should be –

- S**pecific
- M**easurable
- A**chievable
- R**elevant
- T**ime Bound

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**Goals never set,
Are goals never met.**

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Meaningful & Measurable Goals

Meaningful Duties		Measurable Item
1	Account Round	___% of New Business Sales should be Account Rounded
2	Referral Solicitation	___% of New Business sales must have referrals
3	Track and Contact Lost Business	Track and follow-up via phone call and letter on ___% of lost business
4	Response Time	Return all client phone calls within ___ hours
5	Claim Activity	Contact all clients with a new claim within ___ hours

If you expect it, Inspect it!

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Creating Growth Goals

- Strive to enhance productivity by maintaining the following satisfactory level of assigned accounts:
 - Current level: _____ Goal: 700 - 900 clients
- Improve account rounding percentage from ___% to ___% for accounts.
- Increase account retention from ___% to ___% for accounts.

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THINK TANK #2

Agency Growth Goals

2 MINUTES

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Creating Time Oriented Service Goals

- Maximum _____ days between follow-up on pending items
- Minimum _____ days advance service on renewal accounts
- Maximum _____ days follow-up on company and insured after first notice of claim
- Maximum _____ days backlog
- Maximum _____ days turnaround on quotes



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THINK TANK #3 *Time-Oriented Goals*

2 MINUTES



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Importance of Tracking & Reporting

Individual Staff Successes

- Improves Agency Standards (Servicing Your Clients)
- Creates increased revenue with cross-selling, winning-back or referral goals



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Priorities Around Tracking & Reporting

- Source to Sale
- Track Loss Business
- Rounding Accounts



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Remember to keep staff informed on their individual progress AND agency progress.



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Summary

- Have Written Job Designs
- Establish meaningful and measurable goals for employees
- Develop your process for tracking and reporting agency progression



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