Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

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

RIGHT START

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Helpful Resources

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

RIGHT START

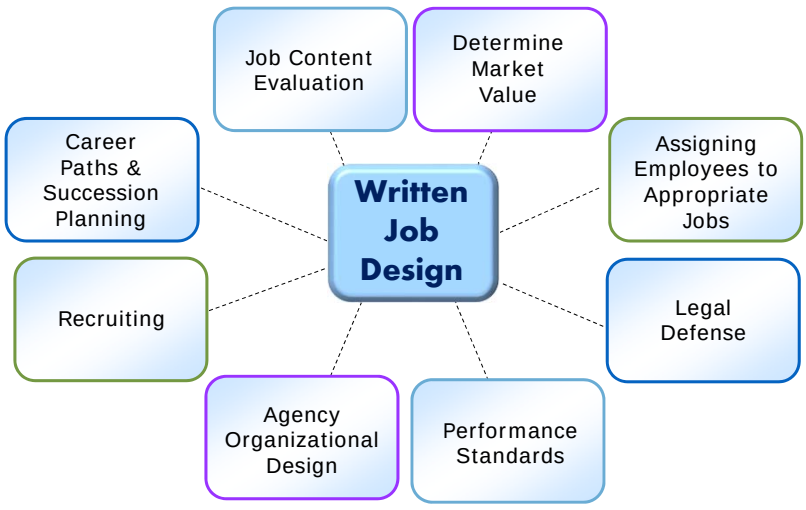
Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Employee Job Design

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

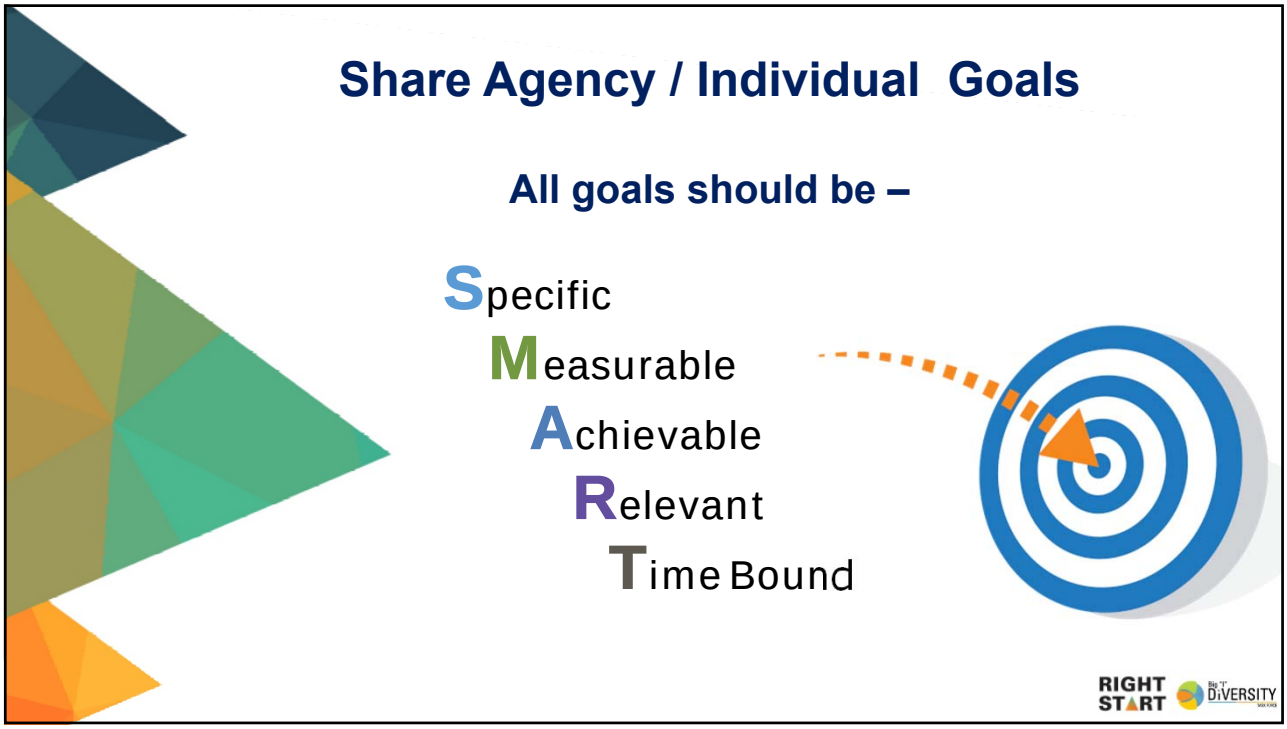
Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Importance of Job Design



Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.



Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

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!

RIGHT START DIVERSITY

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

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.

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

THINK TANK #2
Agency Growth Goals

2 MINUTES

RIGHT START

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

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

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

THINK TANK #3
Time-Oriented Goals

2 MINUTES

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Importance of Tracking & Reporting

Individual Staff Successes

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

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Priorities Around Tracking & Reporting

- **Source to Sale**
- **Track Loss Business**
- **Rounding Accounts**

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Remember to keep staff informed on their

individual progress

AND

agency progress.

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.

Summary

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

Copyright © 2017 Independent Insurance Agents and Brokers of America, Inc. (IIABA) All rights reserved. No part of this presentation may be used for any purpose without the written permission of IIABA.