



RIGHT START

Training Series

PART 2

Employees Your Key to
Increased Productivity



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Session Objectives

- ◆ Enhancing Your Management Skills
- ◆ Creating Written Job Designs
- ◆ Establishing Meaningful & Measurable Goals for Employees
- ◆ Developing a Process for Tracking & Reporting Agency Progression





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PART 2.1

11 KEYS TO MANAGING EMPLOYEES WELL

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11 Keys to Management Success

- 1) Hire **smart, ethical, positive, customer-centric** people
- 2) Teach staff your **agency's history**



11 Keys to Management Success

3) Create a **picture** of what you want the **agency to accomplish**

4) Create a **clear vision** of what you want **each person to accomplish**



5) Give each employee the **necessary tools** to accomplish the **vision**

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11 Keys to Management Success

6) Be **Available...**

7) But, Get **Out of the Way...**



8) And, Stay **Out of the Way**

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11 Keys to Management Success

9) Unless an employee's work style disrupts the agency's operations – **Let Them Work**

10) Praise **GREAT** results

11) Know **"how"** & **"when"** to discipline



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PART 2.2
CREATING
WRITTEN
JOB DESIGNS

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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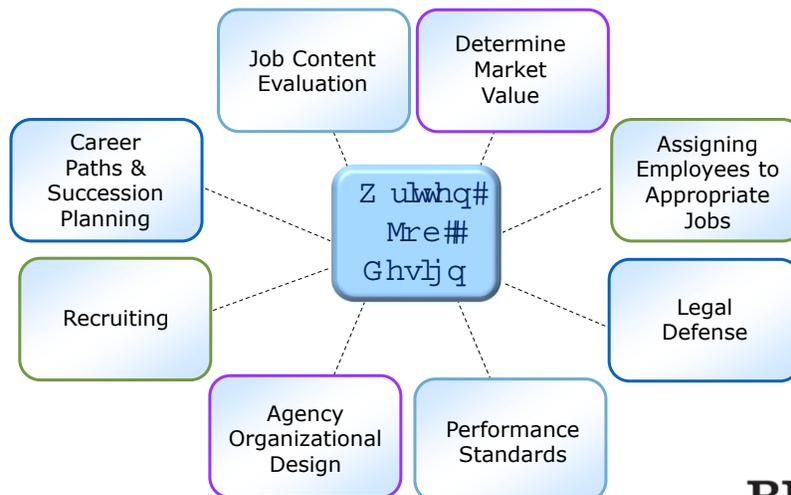
Employee Job Design

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



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Importance of Job Design





THINK TANK #1
Employee Job Designs

2 MINUTES

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PART 2.3
ESTABLISHING
EMPLOYEE
GOALS

Share Agency / Individual Goals

All goals should be –

Specific
Measurable
Achievable
Relevant
Time Bound



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A woman with brown hair, wearing a dark blue shirt, is shown from the chest up. She has her hand to her chin and is looking upwards and to the right with a thoughtful expression. Several black question marks of various sizes are scattered around her head. The background is white with a decorative geometric pattern of orange, yellow, and green triangles at the bottom.

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.





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





THINK TANK #3
Time-Oriented Goals

2 MINUTES

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PART 2.4
DEVELOPING
YOUR TRACKING &
REPORTING PROCESS

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





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



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Summary

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

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