AGENCY PERFORMANCE
PARTNERS

agency assessment

Leadership Guide

Your agency's guide for a successful assessment.

AGENCY PERFORMANCE
PARTNERS

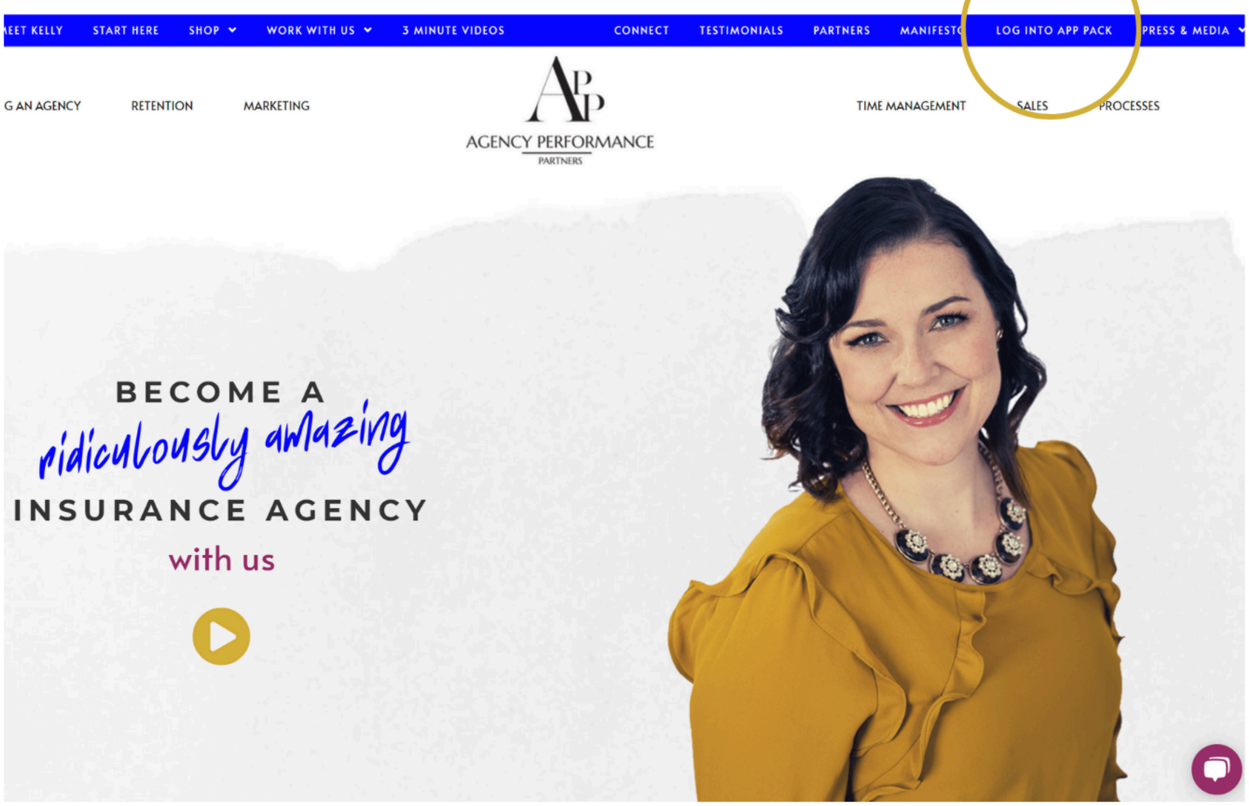
2 YEAR PLAN

STOP...

Before you continue, have you confirmed your account in our Agency Performance Pack?

Yes: Log in and watch the videos along with this guide.
No: Contact us to confirm your login

How to Login:



agencyperformancepartners.com (Log into APP Pack)
Need help? Use the chat feature on our site or email
shey@agencyperformancepartners.com

AGENCY PERFORMANCE
PARTNERS

resources

KNOWLEDGE BASE

Program Documentation &
Agency Best Practices Articles
https://knowledge.agencyperformancepartners.com/knowledge

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AGENT SWAG
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RIDICULOUSLY AMAZING AGENT SWAG

Swag for you & your team!
Use code APPClient for 30% off
agencyperformancepartners.com/shop

AGENCY
Process
pack

AGENCY PROCESS PACKS

Detailed processes for your agency - all included!
Find them in your Agency Performance Pack Login!

AGENCY APPEAL

Need help with agency branding?
Our sister company Agency Appeal has created
the top insurance agency brands
in the country!
agencyappeal.com/brand-guide-examples

WEEKLY PERFORMANCE TEXT

Watch your cell phone! Every Wednesday you
will get a text with a performance
thought of the week and a challenge.

AGENCY PERFORMANCE PACK

Online School That Hosts Our Core Programs!

- Agency Assessment Launch Course
- AppX Time Management Course
- AppX Retention Course
- AppX Sales Course
- Courses added every quarter
- LOG IN AT AGENCYPERFORMANCEPARTNERS.COM
    - (Log into APP Pack - Top Right)

Every program has video content for your team to digest before our bi-weekly coaching meetings.
Add new team members into the courses so they can catch up!

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Welcome

Welcome to the Agency Performance Partners Family!

We are excited to work with you and your team to help you launch and sustain the Agency Assessment program. This was the first program we launched when the company was founded. Since then, it has been refined and developed to drive greater results and team buy-in. Throughout this six-month journey, we look forward to partnering with you and your team.

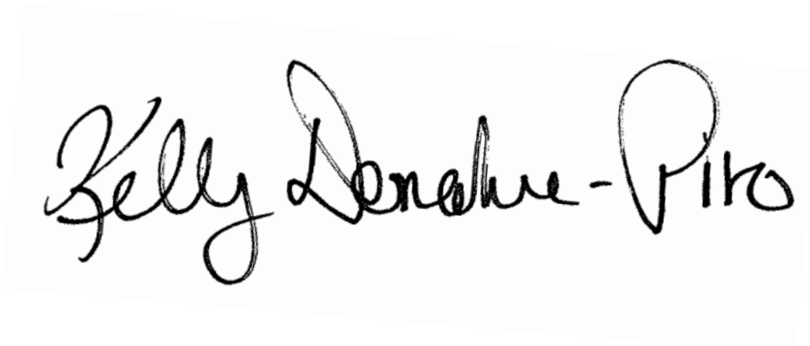
We at Agency Performance Partners (APP) will partner with you through this program. So please do not hesitate to raise your hand with questions, concerns, or if life throws your agency a curveball. With all of our experience working with agencies, there is nothing that we haven't seen. We can help you work through any challenge as we partner together.

We strive to provide the best service to our clients. Here's our commitment to you:

- To be your partner in agency growth
- To return all communications within 24 hours
- To be honest and trustworthy in working together, on all matters
- To treat your agency as if it were our own
- To act with integrity and responsibility
- To work to unlock your team's potential to hit your desired goals
- To bring any and all concerns to you quickly and efficiently

Should you need anything, I am just an email or call away. I look forward to keeping an eye on your results. Thank you for working with Agency Performance Partners. Your business means the world to me and our team.

Here's to your performance,



Kelly Donahue-Piro
President of Agency Performance Partners
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AGENCY PERFORMANCE PROGRAM TIMELINE

AGENCY PERFORMANCE PARTNERS

AGENCY PERFORMANCE PROGRAM TIMELINE

Agency Assessment

Month 1: Onboarding
Month 2: Assessment
Month 3: Develop
Month 4: Agency 2.0
Month 5: Execution of Plan
Month 6: Confirm

AppX Time Management

Month 7: Planning
Month 8: Training Day/Coaching Calls
Month 9: Coaching Calls
Month 10: Training Day
Month 11: Coaching Calls
Month 12: Graduation

AppX Retention

Month 13: Planning
Month 14: Training Day/Coaching Calls
Month 15: Coaching Calls
Month 16: Training Day
Month 17: Coaching Calls
Month 18: Graduation

AppX Sales

Month 19: Planning
Month 20: Training Day/Coaching Calls
Month 21: Coaching Calls
Month 22: Training Day
Month 23: Coaching Calls
Month 24: Graduation

Note for each program we will provide you a detailed timeline

AGENCY PERFORMANCE PARTNERS

time line

AGENCY ASSESSMENT TIMELINE

month 1 onboarding

- New Client Onboarding Survey
- Welcome Kit
- Kick Off Call
- Tell The Team
- Agency Assessment Course
- Execute Secret Shopper Calls
- Agency Report Review
- Agency Assessment Team Survey

month 2 assessment

- Onsite Team Interviews
- Agency Planning Day
  - Develop 10 year vision
  - Confirm the why
  - Review leadership duties
  - Approach to processes
  - Review 8 Money Makers
  - Accountability Chart
  - Values
  - 1 Year Plan
  - Agency Fun Strategy
  - Agency 2.0 Recap

month 3 develop

- Bi- Weekly Meetings
- Clarify Plan
- Job Descriptions & Recruiting
- Metrics
- Incentives
- Data/Agency Standards
- Execute Plan From Assessment
- Get Ready to Launch Agency 2.0

month 4 Agency 2.0

- Agency 2.0 Launch - Off site agency wide team meeting
  - Vision
  - Structure
  - Metrics
  - Incentives
  - Fun
  - Issue Tracker

month 5 execution

- Bi- Weekly Meetings
- Review & Clarify New Plan
- Issue Tracker
- Weekly Data/Goal Check-in
- Team Communication Strategy
- Fun

month 6 confirm

- Bi- Weekly Meetings
- Team Member Progress Review
  - Values
  - Job
  - Attitude
- Weekly Data/Goal Check-in
- Plan For AppX Time Management

new client onboarding

MONTH 1

- New Client Onboarding Survey
- Welcome Kit
- Kick-Off Call
- Tell The Team
- Agency Assessment Course
- Execute Secret Shopper Calls
- Agency Report Review
- Agency Assessment Team Survey

MONTH 1: ONBOARDING

Agency Assessment Month 1 Checklist

	New Client Onboarding Survey*
	Welcome Kit Sent*
	Kick-Off Call 1
	Telling the Team: Set Date to Tell the Team
	Telling the Team: Customize APP Telling the Team PPT Presentation
	Agency Assessment Course (Agency Performance Pack): Take Month 1 Courses
	Secret Shopper Calls: Select Secret Shoppers
	Agency Report Overview: Send APP Reports
	Agency Assessment Team Survey: Send APP Team List
	Agency Assessment Team Survey: Take Survey
	Kick-Off Call 2

*These steps should be completed or nearly completed by this point

Agency Assessment Kick-Off Call I

This call is booked at the time of the new client survey.

Knowledge Base Article

- Click Here
- Search: Agency Assessment Kick-Off Call I: https://knowledge.agencyperformancepartners.com/knowledge

Who should be on the kick-off call?	We limit this call to agency ownership. Once we understand the structure of your agency, we will discuss who should be on future calls.
What are we accomplishing?	The main purpose of the kick-off call is to: • Welcome you • Establish your agency's APP resources • Meet the team • Build your timeline • Review expectations • Identify the next steps for the agency (reports, secret shopper calls, team survey)
Should the agency have anything prepared for the call?	We would like you to have established your Agency Performance Pack Login. After this call, we will have you watch a few videos on the assessment and get you comfortable with our online platform.
How is this call conducted?	We generally hold our meetings via video call on Zoom. The link for the video call will be in your calendar invite.
Does the agency need to document decisions made on the call?	After the call, you will receive a full detailed outline with dates and next steps. The call will also be recorded and transcribed. You are welcome to take notes, but we will ensure your agency is on track!

Agency Assessment Kick-Off Call I Agenda

Note: This may look like a lot, but we will walk you through it, step-by-step. In the interest of time, if we start getting off track, we may schedule follow-up calls to discuss specific items.

Knowledge Base Article

- Click Here
- Search: Agency Assessment Kick-Off Call I Agenda

  https://knowledge.agencyperformancepartners.com/knowledge

Agenda

- Welcome
  - Check on status of welcome kit
- Meet the team
  - Meet APP team
  - Meet agency team members on the call and discuss roles
- Review APP Resources
  - Knowledge Base
  - Swag discount
  - Agency Process Pack access
  - Agency Appeal
  - Weekly performance text message
  - Agency Performance Pack
    - Confirm log-in
    - Share next steps in using the Pack
- Telling Your Team
  - Current team knowledge level of the program
  - Alerting agency managers
  - Team meeting held by agency owners
    - Video call/In-person
    - Folders for each team member
    - Date to tell the team
    - What to say: APP slideshow
      - State of the agency
      - Outline of agency & industry challenges
      - Who is APP? (Video)
      - Hand out team folders
      - Why you selected us
      - 2-year plan (Video)

            - What others had to say
            - Custom introduction by Kelly (Video)
            - What’s next
                - The team completes a survey
                - In-person interviews
                - Build a plan to grow and have more fun
        - Handling the post-meeting meeting
    - Common team FAQs
- Agency Assessment Team Survey
    - Send us the team list
    - Everyone completes the survey
    - Owners have the longest section
    - Average time: 30-40 mins
    - Survey takers can pause and continue the survey at a later time
    - Arrives via email
    - What to do if someone doesn’t receive it
    - What to do if someone gets kicked out and can’t get back in
    - Is it really anonymous?
- Secret Shopper Calls
    - Selecting shoppers
    - Our process
    - Outcomes
- Reports
    - Who will be sending agency reports?
    - Reports needed
    - Guides for AMS360, Epic, and Hawksoft on pulling reports (for other systems, we have an overview for you to work with)
    - Uploading the reports to us
- Timeline
    - Telling the team
    - Agency Assessment team survey release
    - Agency Assessment team survey end date
    - On-site team interview day
    - On-site agency planning day
    - Book kick-off call 2
- Next Steps
    - What we need from you:
        - Team name and email list
        - Organizational chart (indicating locations, if applicable)
        - Reports
        - Select secret shoppers
        - Tell the team
        - Take the Agency Assessment course

        - Take your survey
        - Build schedule and locations for team interviews
        - Send APP PowerPoint template on telling the team
            - Add in your custom content

Telling Your Team About the Agency Assessment

We recommend that you hold off on telling your team until after we complete the kick-off call.

Knowledge Base Article

- Click Here
- Search: Telling Your Team About the Agency Assessment
  https://knowledge.agencyperformancepartners.com/knowledge

Tips for Telling Your Team About the Agency Assessment

What we know in advance, we can prepare for in advance.

Our main goal is to get everyone excited about and comfortable with the Agency Assessment Program. We have developed this recommended strategy to facilitate an effective and efficient launch.

1. Hold a meeting with your managers to make sure they understand the process and why you are investing in a two-year program.
2. Have a staff meeting, led by agency ownership, to announce the program. Make sure you encourage the staff to ask questions and provide feedback.
    a. Where possible, live and in-person is always better.
    b. If not possible, a video conference where you can share our resources can work.
3. Use the APP Announcement slides to help guide the conversation.
4. Be available after the meeting for anyone who may have questions.
5. Proactively ask staff members for feedback.

How you speak to your team about the program will make a big impact. As agency leaders, your team will feed off of your verbal and nonverbal communication. Here are some tips:

- Always speak positively about the partnership.
- Make it clear that you want their honest feedback.
- Encourage them to speak freely to us during the process.
- Let them know their input is critical to agency growth.
- Reinforce to the team that every response is anonymous.

Tips for a Great Team Meeting

To have a successful launch of your assessment, we recommend the following setup for your team meeting:

- Meet with your team all at once, in person. Try to find a day when everyone is available.
- If you have multiple locations, we recommend:
    - Either going to each location to review the program with them, or coordinating a video call where everyone can see agency management and you can see them.

What to Prepare for the Meeting

- We will be sending agency folders to each team member. Included in these folders are:
    - Frequently asked questions
    - What to expect
    - A bio of your Performance Consultant
    - Testimonials from other agencies who have completed the assessment
    - Business card for your Performance Consultant

    - Agenda for the time on site
    - Sample of how survey responses are presented
- We ask that you hand these out to the team members during the meeting (not before).
- APP provides your agency a custom PowerPoint presentation to help you guide the meeting
    - There is space at the beginning for you to outline agency and industry challenges—we recommend you take some time to do this.
        - If you need help, please let us know.
    - There are three videos embedded in the PowerPoint presentation for you to play:
        - Who Is APP?
        - 2-Year program overview
        - Custom welcome message from Kelly
    - You must have internet, sound, and the ability to play the message.
    - You will be emailed your PowerPoint presentation as it is custom-made for you and your agency!
- APP is intentionally not in this meeting with your team. We have identified that by being in the meeting, team members tend to hold back their honest reactions. Instead, we want to make sure team members are open and honest in their response to this program.

Telling Your Team Agency Assessment Team Meeting Agenda

We recommend that you hold off on telling your team until after we complete the kick-off call.

Knowledge Base Article

- [Click Here]
- Search: Telling Your Team Agency Assessment Team Meeting Agenda

- https://knowledge.agencyperformancepartners.com/knowledge

Agenda

- Welcome from agency management
- State of the agency
- Outline of agency & industry challenges
- Who is APP? (Video)
- Hand out team folders
- Why you selected us
- 2-year plan (Video)
- What others had to say
- Custom introduction by Kelly (Video)
- What's next
    - The team completes a survey
    - In-person interviews
    - Build a plan to grow and have more fun
- Ask the team to open their folders and review the information
- Open the floor for discussion on the program and ask for honesty
- Conclude the meeting

Agency Assessment Telling The Team Post Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment Telling The Team Post Meeting
- https://knowledge.agencyperformancepartners.com/knowledge

After the meeting, please connect with us about the team's feedback. The more we know, the better we can serve you!

Make sure you connect with any team leaders or managers for their feedback on how the meeting went. We want to identify anyone who may not be excited, or who may be nervous, about the process. Have the team leader or agency owner meet with that team member to provide reassurance.

Report back to us on how the meeting went—we will be sending you a text to make sure we sync up on the outcome as well!

Common Questions from the Team on the Assessment

Here are some common questions and concerns you may hear from your team:

<u>The survey asks for answers that would make it obvious I am the responder.</u>

The survey is reviewed question-by-question, not by an individual responder, so your exact responses will remain anonymous. If you are concerned, make a note of the question, and be sure to bring it up when your Performance Consultant is on site.

<u>I'm concerned my responses will be used against me.</u>

Our goal is to understand how the agency can improve. Improvement comes from your honest answers. If you have concerns, this is a great opportunity to bring up your concerns anonymously so we can develop solutions.

<u>I don't have time for things like this.</u>

We know your time is limited. You can take the survey over several days if necessary. Your input is incredibly valuable to us. How can we help you find time in your day?

Agency Assessment Course

This course is hosted in the Agency Performance Pack (online school).

Knowledge Base Article

- Click Here
- Search: Agency Assessment Course https://knowledge.agencyperformancepartners.com/knowledge

Who should take this course?	We limit this course to agency ownership. As we review the steps of the assessment, some of the details may give the team the wrong message or make them uncomfortable.
What are we accomplishing?	The main purpose of the course is to provide you access to additional resources. We are here to walk you through everything, but in the event you have a question or are unclear, it's important we provide you additional resources. We are working to serve all types of agency owners to have a successful launch. Also, it's important to us that the agency ownership understands all the tools we provide so you don't miss out. The Agency Performance Pack will play a big part in your team's success as we get to the AppX Programs, so we want you to feel comfortable there first.
How do I log in?	APP sets up your account and you can confirm it from there. If you have any technical difficulties, you can search the FAQ in the knowledge base, or reach out to us. To log in, go to AgencyPerformancePartners.com and in the top right-hand corner, click: Log Into APP Pack. You can then look for the course named: Agency Assessment Course For Ownership

	*Note: Chrome appears to be the best performing browser for the school.
How does the course work?	We break the videos into bite-sized chunks. We recommend you watch them in order, but if you need something or are particularly interested in something, go for it! You only need to focus on the courses that are in the month of the program that you are in!
How long will it take?	The beginning is the longest—think of it like getting an airplane up in the air. The take-off is the most cumbersome. Once we get to month two, it's smooth sailing!

Note: We know that finding time to watch videos can be a challenge. These videos are designed to be short and to the point (we know our audience). We strongly encourage you to take the time to watch them so you maximize your agency's investment. Also—we don't rely ONLY on video, we are always here for you. Adult humans have to hear the same thing 22 times to remember it—so we are working to make sure you maximize all of your APP resources.

Agency Assessment Secret Shopper Calls

As part of the assessment, we conduct secret shopper calls to the agency.

<u>We request that you do NOT share the secret shopper calls process with your team so we can generate authentic results.</u>

Knowledge Base Article

- Click Here
- Search: Agency Assessment Secret Shopper Calls Scenario Profiles
  https://knowledge.agencyperformancepartners.com/knowledge

Who should be secretly shopped?	You have two options: • We can complete a web form and secret shop whoever picks up • You can target specific agents The choice is yours.
What is a secret shopper call?	Our team of trained secret shoppers will place a call to your agency looking for a new business quote. We usually have the shopper indicate they are moving to the area. The shopper provides all the information that is requested and then waits for the quote and follow-up. The secret shopper then completes our survey, records a video about their experience, and uploads the quote as well as any correspondence for your agency's review. The process takes about two weeks from call to completion so that we can test and track follow-up.
What is the timeline?	After Kick-Off Call I, your agency will be sent the information to select your shoppers. You are given profiles to select from and you may choose personal or commercial.

	Once selected, we review your selections for any questions and send them to the shoppers to make the call. They call within 48 business hours of our approval. The shopper waits two weeks to receive any follow-up and quotes and then completes the survey and video, and uploads correspondence. We gather the information, and once all shoppers have finished, we send it to you for review before the on-site portion of the assessment.
Why are secret shoppers important?	At APP, we look at this more like testing your agency's sales process than testing a team member. Many agencies don't have a defined sales process. The secret shoppers help to hold the team accountable, and in many cases, it is revealed the agency is wasting leads. We want to conduct the calls to see where the agency is excelling in new business and where the agency may be missing the mark.

Secret Shopper Call Selection

You will get all the information in the "post-kick-off call I recap email," but here are the secret shopper profiles and selection forms:

- Secret Shopper Call Scenario Profiles: https://knowledge.agencyperformancepartners.com/knowledge/secret-shopper-profiles/-call-scenarios

- Secret Shopper Selection Form: https://share.hsforms.com/1as7MyPP7StudoJKnGp6A0wlbeus

Agency Assessment Report Overview

Knowledge Base Article

- Click Here
- Search Agency Assessment Report Overview
  https://knowledge.agencyperformancepartners.com/knowledge

Who should send the reports and who at APP reviews this data?	You can have anyone on your team send the reports to us. As part of the process, we will identify a data point person for your agency. For security, we ask that you do not email us the reports. We will have you upload the data files securely to us. We ask the reports be in an Excel format (CSV or XLS). Louis Herrero, our data specialist, will configure the data, and Kelly Donahue-Piro will analyze the information.
What happens to the data?	Once at APP, we will take an initial review of the data. We use this as baseline data for the agency. After reviewing it with your leadership team, we will connect the reports to our data visualization software. As we launch Agency 2.0 (month four), we will request reports each week so we can track progress.
How often do you need reports from us?	After we review the data together during the assessment phase, we use the Develop phase (month three) to make some general data adjustments. We often find the report or the data entry processes need to be adjusted. As we launch Agency 2.0, we can't wait for perfection. Our goal is to get started and work towards cleaning up any reporting, download, or manual entry issues

	as part of the agency's path to progress. At month three, we will ask for certain reports monthly and some weekly.
How do we send the reports to you?	In the email you receive after the kick-off call, there will be an upload link for the initial assessment data. As we move through the process you will receive reminders to send the data to us.
Note for Applied Epic, Vertafore AMS360 & Hawksoft Agencies[1]	In the Agency Assessment Leadership Course, there are PDF guides with screenshots and videos to help you gather the information. The trainers have also included some reasons the reports may not look right for troubleshooting purposes.
If your agency is not on Applied Epic, Vertafore AMS360, or Hawksoft.	Don't worry! Our guide will help you gather the information we need. These are very common reports for agency management systems. We can also work with your agency and the management system support team.

What Reports Do You Need to Start the Agency Assessment?

Note: Every agency management system uses different verbiage for different reports. We will provide you common names for these reports and the explanation, so if you need to contact your management system or work with your data point person, we can clarify what we need.

Please upload the reports in an Excel format of CSV or XLS.

Common Report Name	Explanation	Date Range	Required Fields
Book of Business Report	This is a snapshot of the agency at that moment in time based on all policies in force.	NA - this is the date you run the report	Producer CSR Premium Revenue

[1] For Applied Epic and Hawksoft users, we will also need a list of your team member's names and how they are represented in the system. Often, these systems are initial-based and need to match the data to the person.

			Annualized Premium Annualized Revenue Department Location/Branch Policy Type Carrier Expiration Date
Activity Report[2]	This is a report of all the activities your team logs into the management system.	1 Year	Who logged the activity Department Location/Branch Policy Type Carrier Type of Activity Open or Closed[3]
Overdue Activities	This is a report that shows the current overdue tasks/activities. An overdue activity is any task that has a due date in the past.	Today	Who logged the activity Department Location/Branch Policy Type Carrier Type of Activity
Retention	This is the agency's retention rate as defined by the specific management system.[4]	Today	Producer CSR Department Location/Branch Policy Type Carrier
Cancellations	This is a report that shows all the policies that have left the agency. This includes non-payment, carrier's canceling the policy, and clients changing agencies. If a policy has been reinstated, it does not need to be included. [5]	1 Year	Producer CSR Premium Revenue Annualized Premium Annualized Revenue Department Location/Branch Policy Type Carrier Cancellation Reason[6]

[2] If your agency management system uses abbreviations as activity codes please send those to us as well. This is common with Applied System Products.
[3] Applied products allow you to close successful and unsuccessful activities, we would like that information, as well as the unsuccessful reasons.
[4] Each management system will calculate this differently. In many instances, the report may look inaccurate; this is generally due to data entry issues that we will need to collect. Remember, this is just the starting point.
[5] For many agencies, they may not be actively coding replaced policies correctly. An example of a replaced policy is a rewrite. The past company will download a cancellation and without the right workflow, this report may seem inaccurate. That's okay, we are using this as a starting point.
[6] If your agency is currently updating cancellation reasons, we would like this provided as well.

New Business Report	This is a report of all the agency's new business written for the year.	1 Year	Producer CSR Premium Revenue Annualized Premium Annualized Revenue Department Location/Branch Policy Type Carrier Source

What is APP Looking for in the Data?

We are looking for the following in the initial data set:

- Book seasonality
- Workload per person
- Activity on accounts based on account size
- Top types of activities the team is logging
- Consistency in activity logging
- Areas where you can reduce low-level activities
- Agency backlog
- Current retention rate
- Average premium/revenue by account
- Average policies per account
- Cancellation process
- Cancellation reasons
- New business production
- Agency closing ratio
- Cross-selling as it relates to new business
- Policies below agency standards that can be targeted
- Agency fee consistency

Agency Assessment Team Survey

Knowledge Base Article

- Click Here
- Search: Agency Assessment Team Survey
  https://knowledge.agencyperformancepartners.com/knowledge

Who should take the survey?	All active employees of the agency. Owners included.
What does the survey cover?	We review the following core areas of an insurance agency: • Ownership • Culture • Management/Leadership • Marketing • Sales • Service
When does it go to the team?	During the kick-off call, we will determine the date the survey will be released to the team via email. We will also determine the date by which the team has to complete it. The survey is sent via email. If anyone does not receive it, please let us know (after they check their junk and spam folders). Once everyone has completed their surveys, you will receive a copy of the responses emailed to you for review before the on-site visit.
Why is the survey important?	The survey allows APP to benchmark you against other agencies and prepare for impactful on-site team interaction. It also allows the leadership team to fully understand the agency culture and what is happening in the company.

Where is the survey taken?	The survey is entirely online via SurveyMonkey.

Agency Assessment Team Survey Frequently Asked Questions:

- What if someone on my team didn't get the survey?
  - Have them check their junk and spam folders first.
  - If it is not there, have them email us and we will send them a new link.
- The survey kicked me out to the very beginning, do I have to start again?
  - Not at all! Just email us!
  - The survey uses cookies. If you clear your cookies, it may send you back to the beginning.
- How will we know everyone completed it?
  - Our Client Concierge will be updating you on the process.
- What if someone doesn't complete the online assessment?
  - From time to time, we get someone who is trying to test the boundaries to see how important this program really is. It will become apparent pretty quickly as we track the number of agents completing the survey. This only happens in rare cases, but your Performance Consultant will work with you if this occurs.

Agency Assessment Kick-Off Call 2

Update From Kick-Off Call 1

Update on Telling the Team

We want to take a few moments to review how it went telling the team:

- How was the meeting?
- What questions came up?
- Does anyone have any concerns we can assist with?

Update on Agency Assessment Leadership Course

Check-in on course progress:

- Questions on what is in the course
- Status check on how far into the course you are
- Technical issue review

Secret Shopper Call Selection

Update on Secret Shopper Call Process:

- Have you selected the shoppers?
- Any questions on the process?
- Update on where we are in the process

Agency Reports

Update on agency reports:

- Have reports been sent in?
  - If no: What questions can we answer and what is the timeline?
  - If yes: Review initial reports and make suggestions for modifications

APP Team Survey

- Survey status (users, sent, and progress)
- Reminder on if someone gets kicked out
- Review of final date

Secret Shopper Results Review

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment Secret Shopper Review
  https://knowledge.agencyperformancepartners.com/knowledge

Who should see the results?	We recommend only owners at this point. When we work on site with you, we will discuss revealing the secret shopper calls to the team and if that is a good strategy.
What do we review from the secret shoppers?	• Overview - This is all of the survey responses from your agency aggregated. This PDF is great for seeing common themes in your sales process. • Folders - You will receive a link to a folder where each call is stored by the caller's name. ○ Video from the shopper on their experience ○ Quotes they received ○ Communication they received from the agent ○ Survey response • Management System - We also recommend that you match the secret shopper to your new business process to ensure the team member followed the new business process.
When do we need to review these?	They should be reviewed before the Agency Planning Day meeting
Why do we do the secret shopper calls?	We aren't as interested in testing the person as we are in testing the general sales process. Many insurance agencies do not have a solid trackable sales process, so we want to understand the customer experience.
How do I get the calls to review?	Nicole Vadnais will send you a link to the Google Drive Folder via email.

Strategy To Review Secret Shopper Calls

- Start by reviewing the overview
  - Read the responses
  - Take notes below on the areas you feel need the most improvement
- Select caller to review
  - Read the entire survey first, start to finish
  - Re-read the survey and take notes in the area below
  - Open your management system. Did the agent follow your new business process?
  - Review the quotes provided. Was the caller quoted to your agency standards?
  - Review the communication with agents. Were they professional and up to your standards?
  - Watch the secret shopper caller video
  - Make any final notes
  - Repeat this with each caller
- Identify the top three takeaways on your current sales process

Secret Shopper Call Review Sheet

Overview of All Secret Shopper Calls Notes:

Review: ____

- ☐ Management System Process ____
- ☐ Quoted to Agency Standards____
- ☐ Communication To Clients____

General Notes on Experience:

Review: ____

- ☐ Management System Process ____
- ☐ Quoted to Agency Standards____
- ☐ Communication To Clients____

General Notes on Experience:

Review: ____

- ☐ Management System Process ____
- ☐ Quoted to Agency Standards____
- ☐ Communication To Clients____

General Notes on Experience:

Review: ____

- ☐ Management System Process ____
- ☐ Quoted to Agency Standards____
- ☐ Communication To Clients____

General Notes on Experience:

Review: ____

- ☐ Management System Process ____
- ☐ Quoted to Agency Standards____
- ☐ Communication To Clients____

General Notes on Experience:

Agency Assessment Report Review

Knowledge Base Article

- Click Here
- Search: Agency Assessment Report Review

  https://knowledge.agencyperformancepartners.com/knowledge

Who should see the reports?	We recommend only owners at this point. With many agencies, we have to work to clean up reports. At this stage, they may not be accurate. We look at this as a starting point and need to confirm the work that needs to be done.
What do we review from the reports?	We have a list of processed reports we pull from your raw data. In many instances, we must combine reports and filter the data. Once we receive the data, we will alert you if we need any modifications. From there, we will be looking at the following from your data: • Book seasonality • Workload per person • Activity on accounts based on account size • Top types of activities the team is logging • Consistency in activity logging • Areas where you can reduce low-level activities • Agency backlog • Current retention rate • Average premium/revenue by account • Average policies per account • Cancellation process • Cancellation reasons • New business production • Agency closing ratio • Cross-selling as it relates to new business • Policies below agency standards you can target • Agency fee consistency

	If we are unable to get some of this information from your system, we will work to get the information we need over time.
When do we need to review these?	They should be reviewed before the Agency Planning Day meeting.
Why do we review the data even if we know it may not be accurate?	We view the initial data pulls as a starting point. In the next 90 days, we will work with you to determine how to get the best data and then build a data dashboard for your agency. As we receive benchmark data, this will be our starting point. We want to show the team the metrics to share progress. As we share individual metrics, team members become more in tune with accurate data entry and adopting the strategies we train them on.
How do I get the data to review?	As reports are ready, we will share them with you with an update on where we are with all reports. After the on-site date, we will work to clear up any initial data issues and build your dashboard. Each week, you will send reports to APP, and the dashboard will be updated.

Strategy To Review Reports

We will send you reports as they become ready via Google Sheets. This is our initial data review to obtain your feedback. After your on-site, we will begin the process of the deep dive into these reports.

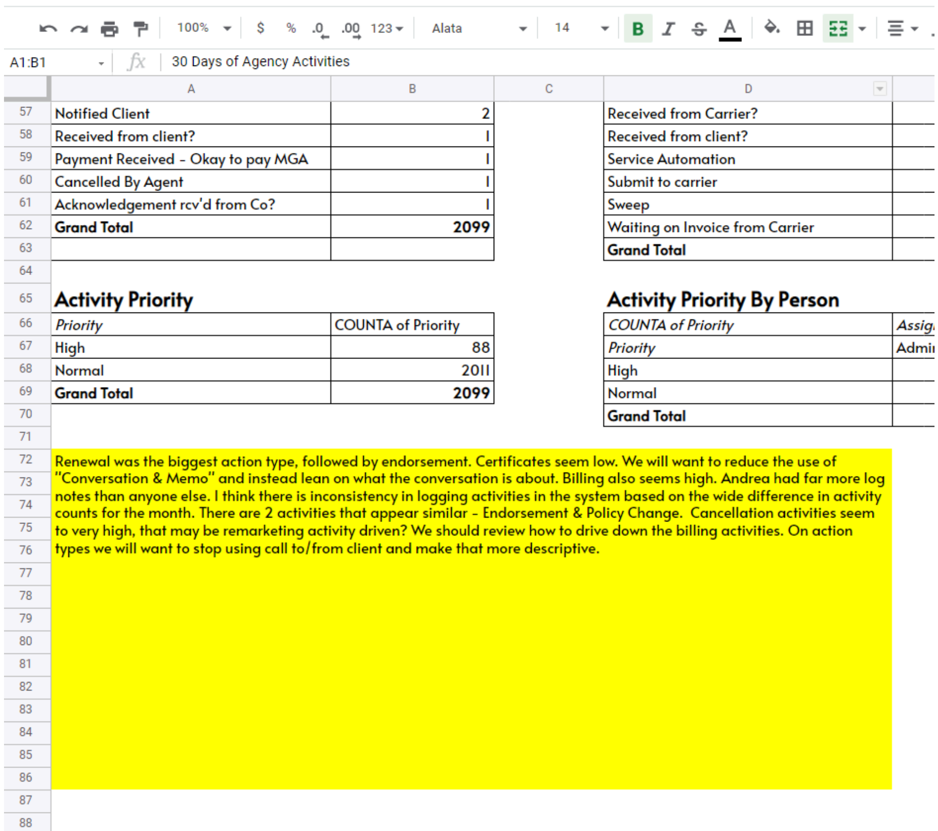
Take a look at the report titles so you can see which fields we pulled from.

<u>If a report we pulled should be run on a different field—please indicate that on the report. At the bottom of each report is a yellow box with our comments, notes, and questions. You can leave comments there for our review.</u>

We separate the Google Sheet into Raw Data and Reports. Raw Data (red) is the information you sent to us. Reports (Green) is our processing of the data.

How to Leave Notes for Us on Reporting

Below is a sample screenshot of the yellow box you will see on every report.



You can tag me in a note for review at Kelly Donahue-Piro (@kelly donahue-Piro). Please leave your comments and notes here.

Here are some things to check for:

- Team members who are no longer with the agency
- Accuracy of data
- Fields we selected (your agency may prefer different fields, we can update those very easily!)
- Any data surprises—a data surprise may be that you are surprised by certain metrics. For example: account manager A has 30% more activities than account manager B.
- Anything you would like to see in the report (i.e., broken down by department, location, etc.)

Agency Assessment Team Survey Review

Knowledge Base Article

- Click Here
- Search: Agency Assessment Survey Review

  https://knowledge.agencyperformancepartners.com/knowledge

Who should see the survey responses?	We recommend only owners at this point. For many agencies, there will be feedback about managers in the survey. For this reason, we believe that managers should see filtered results after you have been able to review them.
What do we review from the survey?	We are looking to get a general idea of what is working and what is not. The data is reviewed against other agencies to find where your highs and lows are in the business. We are also looking for any team member outliers that could be holding the agency back.
When do we need to review the survey?	They should be reviewed by the Agency Planning Day meeting
Can you tell us who said what on the survey?	No, we cannot. The survey is designed to bring to light agency issues. It's not important who said what. It's only important what is said. Our goal is to work through the challenges, not necessarily who brought them up.
How do I get the survey responses to review?	You will get an email from us when the survey responses are ready for review.

Strategy to Review the Assessment

- Keep the assessment confidential. This includes making sure it is not left on the copier, on your monitor, or out for general viewing.
- Try to avoid responding to anything you read in the assessment until we come out and interview the team and work on your plan!
- Read the assessment twice. The first time, you will see all the challenges. The second time, you will see the good stuff.

- Take notes in the space below. When we have our planning day, we can review your questions, observations, and concerns.
- APP reviews the assessment shortly before the on-site interview visit so it is fresh in our head. If you have any immediate questions, let us know and we can review the responses sooner.

Use this space to jot down any notes as you read the Agency Assessment:

MONTH 2

- On-site Team Interviews
- Leadership Planning Day
- 10-Year Vision
- Leadership Roles
- Accountability
- 8 Agency Money Makers
- Values
- 1 Year Plan

assessment

MONTH 2: ASSESSMENT

Agency Assessment On-Site Team Interview Preparation

Knowledge Base Article

- Click Here
- Search: Agency Assessment Team Interview Preparation
  https://knowledge.agencyperformancepartners.com/knowledge

Who should be interviewed?	We recommend that all employees of the agency be interviewed. If someone is out of town or remote, we can schedule a Zoom interview before the on-site dates. We ask that owners and managers be interviewed toward the end of the interview schedule if possible.
What do you ask during the interview?	We are looking to confirm and clarify what we have found in the survey, reports, and secret shopper calls. Our main goal is to build rapport and understand your team. Below are some sample questions.
How long is each interview?	Approximately 30-45 minutes.
Where should the interviews take place?	We request that there be a private area where team members can speak freely uninterrupted.
How is the schedule determined?	Due to standing meetings we may have with other APP clients, we may have a few blackout dates during the desired interview days. We will alert you to the times we are not available and ask you to create a schedule for team interviews. If there are multiple locations or agents who only work on certain days, we can be flexible.

	We ask that the schedule be confirmed one week before we arrive and be shared with the team. There is a schedule format below you can use.
Do we see your notes from the meetings?	No. Meeting notes are for my personal use. To honor confidentiality, I use them only for my personal reference.

Interview Questions/Format

- Background on Agency Performance Partners
- APP Role
- Confidentiality
- What happens next
- What is your favorite thing about working for this agency?
- What do you love about your job?
- Do you have any ideas on how to improve the agency?
- If you owned the agency (owners won the lottery), what is the first thing you would change?
- How do you feel morale is within the agency?
- What are your goals?
- How do you feel the agency can grow even more?
- Do you have any ideas on how to be more efficient and effective?
- Is there any specific training you or the team could benefit from?
- Is there anything that keeps you up at night about this job?
- What agency goals and rewards would you like to see?
- Is there any feedback regarding the owners or your managers that you would like to share?
- What do you feel is the number one thing I could do to help the agency?
- Is there anything else you feel I should know to do an effective job?
- Do you have any concerns about working with us?
- Do you have any questions for me?

Interview Schedule Template

Date: ___________________________________

Time	Location	Name	Role
8:00-8:45			
8:45-9:30			
9:30-10:15			
10:15-11:00			
11:00-11:45			
11:45-12:30			
12:30-1:15			
1:15-2:00			
2:00-2:45			
2:45-3:30			
3:30-4:15			
4:15-5:00			

Agency Assessment On-Site Leadership Planning Day

Knowledge Base Article

- Click Here
- Search: Agency Assessment Leadership Planning Day
  https://knowledge.agencyperformancepartners.com/knowledge

Who should be included on Leadership Planning Day?	We recommend that only ownership be present on that day. However, key team members and managers should be on standby in case we need them for information or to update them on specific thoughts. Depending on how the sessions go, we may opt to update any managers on our progress.
What happens during this time?	Depending on flights and time constraints, we spend about 1-1.5 days together and have a dinner meeting the prior evening. Below is a sample timeline*: Evening Before: Dinner to review assessment findings Planning Day: 9:00am-5:00pm Planning Day Recap: 9:00am-11:00am Please see below for a sample agenda *Note: We will prepare a customized and confirmed timeline for your agency. This is only a sample.
How do we handle differences of opinion?	When team members have differing views, we really need to listen—to listen. Oftentimes, the parties aren't that far off in what they want to accomplish. If there is a senior or majority owner, they will be the tiebreaker. If not, we need to strive for compromise and/or table it for discussion the next day when team members have more time to process.

Where should the meeting take place?	The meeting should take place somewhere private where there will be no interruptions.
What do we need to do to prepare for this meeting?	We have a list of activities that we request you prepare before the meeting. You can find them below. Please take your time and take them seriously.
What happens after the meeting?	After the meeting, we will type up notes of our plan for your agency. We will also book our first bi-weekly call for the following week.

Agenda For Planning Day

- Evening Before: Dinner with ownership: This is when we review where we are.
- Planning Day (9:00am-5:00pm): This is when we review where we are going.
    - Agency 2.0
    - Accountability chart
        - Owner roles
        - Owner activities to transfer
    - Vision for:
        - Sales
        - Operations
        - Finances
    - Review Current Team
        - Job descriptions
        - Metrics
        - Incentives
        - Accountability to data
    - Agency Values
    - 1-Year Plan
        - Revenue
        - Profit
        - Goals
        - Agency standards
        - Reporting
        - Steps to take
        - Issues that will get in our way
    - What's next
        - Traction-book
        - Sleep on it
        - Agency 2.0

- Regroup in the morning

- ☐ Review the agenda for Planning Day
- ☐ Review team survey responses
- ☐ Review secret shopper call responses
- ☐ Review reports

10-Year Plan

Stop and think really hard. What do you want this agency to be in 10 years? Don't just think about the premium. Think about your personal life, your culture, the type of clients, the client experience. Take 10 minutes and just think about the agency in 10 years. Write down what you see.

Why is this vision important to you?

If you struggled to get a vision for the next 10 years—what distractions kept popping into your head?

Executive Job Details

We often find that many agency leaders are working below their pay grade and filling the gaps for jobs they shouldn't be doing. Write down all the jobs that fit in these categories:

Desire Zone You love this work and want to do more of it!	Proficient Zone You are good at this work but don't love doing it.
Drudgery Zone You hate this work but you may be the only one who can do it currently.	**Distraction Zone** You aren't that good at the work but have to do it.

List all the jobs you perform that are below your paygrade:

APP Approach to Agencies (STARTS):
(S) System: Make everything work with a systematic process.
(T) Time: Everyone has a role, identify the role and free up time.
(A) Accountability: Hold every team member accountable to the process and agreements.
(R) Respond: Issues will not go unanswered, every issue will be documented and handled.
(T) Team: Build a team for the agency's vision. Roles aren't people. You deserve the best.
(S) Simple: Everything we do must be simple to understand.

Jot down some notes and questions on our STARTS approach. Which one will be the biggest challenge?

How Agencies Make Money
Review each way agencies make money. Give your agency a grade and write down some thoughts as to why you gave this grade:

Way to Make $	**Grade**	**Notes**
New Business		
Retention		
Cross-Selling		

Coverage Improvements		
Book/Carrier Management		
Expense Management		
Fees		
Firing Unprofitable Clients		

Review Current Team

During this section of the meeting, we want to discuss each team member and their role. Our goal is to identify which team members are the most vulnerable by performance and fit for the agency. Consider each team member and grade them for the following:

Team Member Name	Job Performance (1-5 Scale)	Culture Fit (Yes/No)	Right Seat? (Yes/No)	Notes

Review Current Team - Structure

Take a moment to collect notes on the following team management objectives:

Objective	Notes	Plan
Does everyone have an accurate up-to-date job description?		
Is it clear who each person reports to?		
Does everyone have metrics for their role?		
Are metrics for each team member provided weekly?		
Is there a current incentive/performance-based pay plan?		
Is the incentive/performance-based pay plan working?		

Agency Values

In many agencies, there are frustrations that are not directly related to the business of selling insurance. Examples of this are dealing with resistance to change and a negative attitude. We want to create and launch agency values that are more than just a poster on the wall. To prepare for the meeting, take a moment to answer the questions and review the sample value statement below. Once established, we will create agency materials for you.

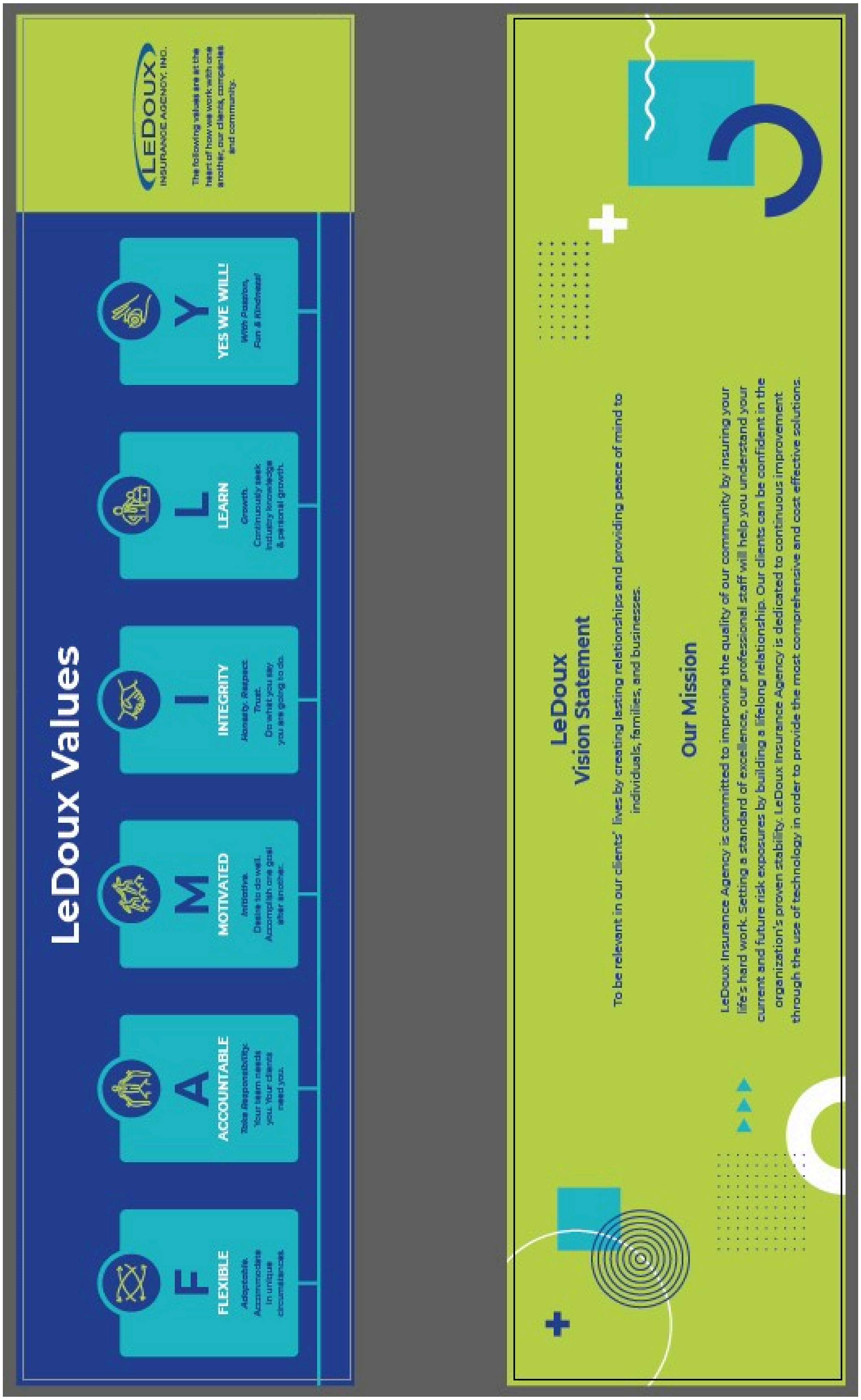
Note: We want to make it an acronym if possible.

What are some words that resonate with you when you think about your agency values?

What are some internal non-job-related frustrations that you would like to address in your values?

Are there any acronyms that you think may be a good fit?

Sample Value Statement



1-Year Plan

After Planning Day, APP will create a 1-year plan that we will revisit after we launch Agency 2.0. Take a few moments to consider the following:

What is your 10-year growth goal?

What is your agency's target profit margin?

Other than revenue growth, do you have any goals for the agency you want to share?

Does your agency have coverage standards? If not, jot down some ideas.

Reporting will be very important in year 1. Who on the team can work with us on this project? Are there any reports that are important to you?

What are the issues you see in the agency that you want to tackle next year?

What's Next

- Depending on the travel schedule, we may meet the next morning after everyone sleeps on it.
- APP will create the following:
    - Growth Calculator
    - Agency 2.0 Prep Checklist
    - 1-Year Plan
- We will book bi-weekly calls with your agency (You will meet as an executive team weekly).
- Our major goal is to get ready for Agency 2.0!

MONTH 3

- Bi-Weekly Calls
- Job Descriptions & Recruiting
- Metrics
- Incentives
- Agency Standards
- Execute Plan
- Agency 2.0 Launch Plan

develop

MONTH 3: DEVELOPMENT

Bi-Weekly Calls

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment - Month 3: Develop - Bi-Weekly Calls
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be on the calls?	We will discuss this during the on-site assessment. Generally speaking, the agency's executive team will be included in these meetings.
What happens during these meetings?	Post assessment, APP will create an Agency Assessment Leadership Checklist. This is custom-made for each agency and broken down over the next several months. Before each meeting, we will send you an agenda of the items we will be reviewing and offer you the opportunity to add any new agency items to the agenda. We will review the steps needed to be completed by this meeting. We will also assign the next steps on the Agency Assessment Leadership Checklist. After each meeting, we will send an email recapping the meeting along with a list of the next steps.
What if someone did not execute their Agency Assessment Leadership Checklist Items?	Everyone gets delayed every now and then. APP will be watching for patterns of this behavior and address them directly. When there are delays, we won't discuss the reasons. We will need to focus our energy on getting back on track and honoring the commitment to the agency, team, and clients to launch Agency 2.0
Where should the	The meeting should take place somewhere you can speak

meetings take place?	freely. The meeting will be hosted on Zoom and the meeting information will be on the calendar invite.
How should we prepare for these meetings?	You can review the meeting notes from the previous meeting and view the agenda that will be sent out three days before each call.
What happens after each meeting?	After each meeting, we will type up notes and determine our next steps.

Note: Every call will be recorded and transcribed in case we need to refer back to them.

Job Descriptions

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 3: Develop - Job Descriptions
- https://knowledge.agencyperformancepartners.com/knowledge

Agency Performance Pack Course

- For more information, you can take this course: Building Agency Job Descriptions For Every Role In Your Agency

Who should get job descriptions in our agency?	Everyone. We always start with the executive team to clarify their roles and make sure they are working on the right activities that are targeted to help you achieve the agency's vision. After those are completed, we will work on each team member's job description.
How do we get started with job descriptions?	APP has templates for almost every role in an insurance agency. You can click here to see our templates (your agency also gets a link to specific templates for you that you can edit). We recommend you use our templates as a starting point and work to polish them up for your agency.
When will we roll these out to the team?	We will start sharing the executive team's roles when they are ready. The new organizational chart will be shared with the team at the Agency 2.0 meeting.

	Within one week from the Agency 2.0 meeting, the executive team will have one-on-one meetings with each team member about their job description, compensation, and incentives.
How often will the job descriptions be updated?	Job descriptions should be reviewed quarterly with each team member and updated as needed. There should be a formal update every year.

The job descriptions are designed to bring clarity and accountability to each role. We would like an up-to-date document that shows exactly your expectations. All of the job descriptions have metrics and the agency's values.

Sample Job Description

Personal Lines Account Manager

Mission of the Personal Lines Account Manager

To serve and grow the book of clients assigned to you by providing extraordinary service, educating the customer, identifying revenue growth opportunities, and generating referrals. Account managers focus on growth within their current book of business while also backing up their co-workers.

Desired Outcomes of this Role

1. Maintain a retention rate of X for your book of business
    a. Proactively reach out to clients
    b. Conduct ongoing account reviews for your designated portion of the business
    c. Work efficiently and effectively with clients on their policies
    d. Effective account rounding
    e. Generate referrals for personal lines and other departments
    f. Educate clients about the benefits of having our agency as their agency
    g. Proactively call canceled business to try to win them back immediately
2. Generate additional revenue from the book of business
    a. Review accounts when clients call in and work to improve coverage both through endorsements and coverage increases
    b. Identify account rounding opportunities and proactively pursue them
        i. Identify coverages that clients have with other agents
        ii. Generate demand for coverages the client didn't know they needed (i.e. umbrella)
    c. Consistently share the agency's referral program with clients
3. Conduct account reviews
    a. Complete 100% of account reviews assigned to you each week, including reviewing potential discounts and coverage gaps
    b. Contact clients for a formal review, improving the client relationship, generating opportunities, and reducing remarketing

    c. Follow agency remarketing guidelines
4. Provide outstanding inbound service on claims, billing questions, and endorsements
    a. Work to manage clients' expectations
    b. Follow-up with clients via phone or email
    c. Use every opportunity to confirm and update client contact information
    d. Educate clients on the benefits of using our agency
    e. Service personal lines accounts in a manner so as to eliminate gaps in coverage, thus reducing E&O exposures
    f. Document the management system
    g. Follow agency service standards on follow-up and follow-through
5. Demonstrate a positive attitude and efficient work ethic
    a. Work to increase and improve efficiency on a daily basis, including finding ways to streamline processes, using technology tools to the fullest, and limiting distractions
    b. Possess and maintain a positive attitude, including positive working relationships with clients and agency personnel
6. Conduct audits on new business files
    a. Work with producers to check their new business files for accuracy
    b. Send any onboarding materials to clients post-sale
    c. Update any missed new business items
7. Sell new business for the agency
    a. Take new business opportunities and quote them either on the phone or book an appointment to review quotes within 48 hours
    b. Follow the agency sales process
    c. Follow-up according to the sales process
    d. Hold the target agency closing ratio
8. Work to support the marketing and branding team in the following ways:
    a. Provide them any business cards to be used in marketing campaigns
    b. Suggest blog, email, and social media topics to the marketing department
    c. Share agency social media posts on personal social networks
    d. Participate in picture and agency branding opportunities when invited
9. Other responsibilities as directed by your manager

Key Performance Indicators (Metrics)

Key Performance Indicator	Current	Goal	Date to Track	Method to Track
Book Growth			Monthly	Book of Business from Agency Management System
Retention			Monthly	Retention Report from Agency Management System
New Business			Monthly	New Business Report from

				Agency Management System
Re-Marketing Closing Ratio			Monthly	Spreadsheet OR Agency Management System
New Business Closing Ratio			Monthly	Agency Management System

Principles

- Address difficult issues professionally and quickly
- Listen to learn and strengthen the agency
- Be relentlessly positive with the team and see their potential when they cannot
- Outlast the suck of adopting change
- Be driven to achieve the agency's goals

Critical Competencies

Efficiency	Able to produce significant output with minimal wasted effort.
Honesty/Integrity	Does not cut corners unethically. Earns trust and maintains confidence. Does what is right, not just what is easy.
Organized & Planning	Plans, organizes, and schedules in a productive manner. Focuses on key priorities.
Follow-Through	Lives up to verbal and written agreements, regardless of personal costs.
Persistence	Demonstrates tenacity and willingness to go the distance to get something done.
Proactivity	Acts without being told what to do. Brings new ideas to the company.
Flexibility/Adaptability	Adjusts quickly to changing priorities and conditions. Copes effectively with complexity and change.
Calm Under Pressure	Maintains stable performance when under heavy pressure or stress.
Enthusiasm	Exhibits passion and excitement about work. Has a can-do attitude.
Work Ethic	Possesses a strong willingness to work hard and sometimes long hours to get the job done. Has a track record of working hard.
Listening Skills	Lets others speak and seeks to understand their viewpoints.
Communication	Speaks and writes clearly and articulately without being overly verbose or talkative. Maintains this standard in all forms of written communication, including emails.
Teamwork	Reaches out to peers and cooperates with supervisors to establish an overall collaborative working relationship.

Persuasion	Able to convince others to pursue a course of action.

Feedback:

- After 90 days, you will meet with your manager to review any bottlenecks, ideas you have to improve, and the objectives outlined in your job description.
- Additional feedback will be given as needed.

Recruiting

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment - Month 3: Develop - Recruiting
- https://knowledge.agencyperformancepartners.com/knowledge

Who should handle recruiting in our agency?	We will assign accountability for the recruiting process during this phase. There will be one team member responsible for sourcing and initial interviews. The entire executive team needs to work with team leaders to find and hire the best talent.
What are we looking for in talent?	We want to find someone who is teachable and has a great attitude. From there, we can train them. You need to consider your values and whether or not your agency is in a position to train new agents, or if you need to find trained agents. There are training shops and agencies that need semi-trained agents. First, we will identify what you need.
When are we recruiting?	Officially, we will begin recruiting in Month 3 and continue through the life of the agency. In order to achieve your goals, you must be constantly looking for talent for the following reasons: • In order to achieve your goals, you may need more team members • Not everyone may want to participate in Agency 2.0 once you outline your vision (this is OK!) • You may be holding on to the wrong team members. and we need to find you the talent you deserve. • Your team deserves the best staff. This means you have

	to be in a position to let go of agents when they are no longer a good fit.
How are we recruiting?	We have an agency hiring guide that we recommend you review to have the best strategies to find top talent!

We will walk you through each step of recruiting and will also do a final interview if you request.

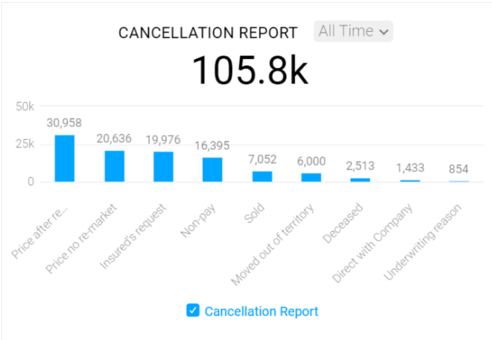
Metrics

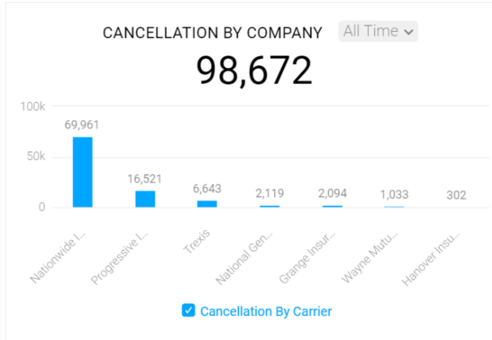
Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 3: Develop - Metrics
- https://knowledge.agencyperformancepartners.com/knowledge

Who should work with APP on our metrics?	We will work to appoint a metrics team. We usually begin with the agency's leadership to get the initial reports set up and reviewed. From there, we will ask a few team leaders to review the reports for accuracy. When agency metrics are inaccurate, there are three possible reasons: Report setup, download, or inaccurate data entry. Oftentimes, it's all three.
What are we looking for with metrics?	During the initial assessment phase, we will request a few reports. During this phase, we will polish them up so we can reveal them during Agency 2.0. Here is a list of the reports we will tackle. (Search Agency Assessment Report Review in the Knowledge Base)
When are we focused on reports?	We will focus on one report at a time. Once we are comfortable with that report, APP will build them into an agency Dashboard. Each report may take a different team of agents.

Here is a sample of the Agency Metrics Dashboard:

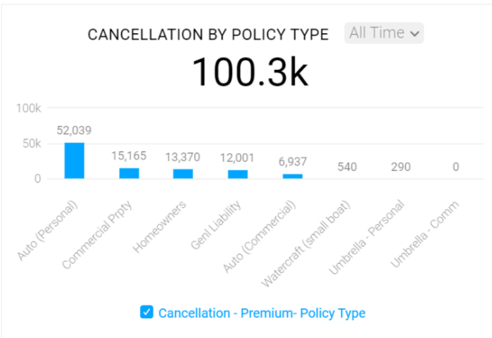


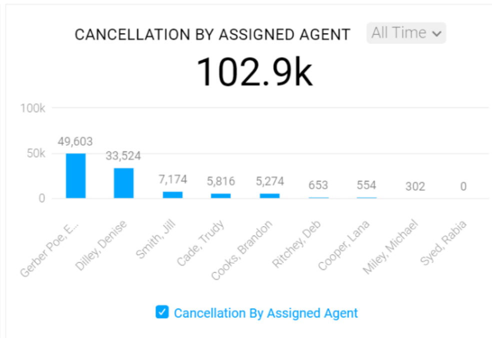


CANCELLATION BY REASON

Last 30 days (Jul 19 - Aug 17)

Metrics	Last 30 days
Price after re-market	28,871
Insured's request	8,451
Non-pay	7,361
Price no re-market	6,322
Sold	4,989
Moved out of territory	3,927
Underwriting reason	854
Deceased	849
Direct with Company	755





Incentives

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment - Month 3: Develop - Incentives
- https://knowledge.agencyperformancepartners.com/knowledge

Who in the agency should receive incentives?	Everyone! Owners can take their agency bonus or distribution as decided, but every team member needs skin in the game! We recommend that there be an agency-wide incentive plan (also known as performance-based pay). Our incentive plan will be based on your book of business growth. We will tailor this to your agency and it should be agency-wide. Each role can have additional incentives for its specific job description. We will review this after the assessment.
What is the incentive program you recommend?	We have a formula for a quarterly incentive plan based on a book of business growth. Based on the compensation and other incentives, we will customize this for your team. Here is a sample of the Book of Business Growth Incentive.
When do we launch this?	We will discuss it at the Agency 2.0 meeting. It should go into effect next quarter.
Why should we do an incentive program?	As we ask the team to get on board to achieve your agency vision, it's important that you share the growth. Most team members want to know what's in it for them. An incentive program will help them understand the numbers, produce accurate data, and think more like an owner.

This is a great incentive plan as it motivates team members to have accurate information in your management system. It also covers all agency growth, not just new business.

Agency Standards

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 3: Develop - Agency Standards
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be held to the agency's standards?	Everyone! This includes owners and producers. The entire agency needs to uphold the agency's standards. No matter what.
What is an agency standard?	Agency standards are the coverages, process, and binding requirements that everyone follows. No matter what. Violations of agency standards need to be met with disciplinary actions. As part of the process, we will also have someone check the policies for adherence to the standards.
When do we roll this out?	We will discuss it at the Agency 2.0 meeting. It should go into effect next quarter. There will be a training period for a quarter to help team members adapt.
Why do we need agency standards?	All too often, agents bind less-than-ideal policies to make clients happy. Agents need to know when to walk away and say no and adhere to agency standards. With agency standards, you can: • Optimize your time • Serve ideal clients to the best of your ability • Identify who you serve best • Gain referrals from the best business

Here are some common agency standards we review:

Personal Lines

- Rate Increase $
- Rate Increase %
- Auto Liability Minimum
- Auto Deductible
- Rental Car Reimbursement
- Towing
- Repair/Replace
- MedPay/PIP
- Glass
- Home Liability
- Water Sewer Back-Up

Commercial Lines

- Rate Increase $
- Rate Increase %
- EPLI
- Cyber

Re-Marketing Standards

- Open Claims?
- Minimum Premium
- Monoline
- Do you want to keep them as a customer? Define what this looks like.
- Pets
- Property Type
- Home Activities (daycare, bike ramp, diving board)
- Roof Age
- Electrical
- Plumbing

Sample Customer Experience Standards

- Maximum 24-hour turnaround time on all quotes. Team goal: work to quote over the phone.
- Remarkets will be quoted over the phone or an appointment will be set to deliver options.
- We will absolutely never email a quote before having a conversation with the client.
- When you are here, you will pick up the phone for any client who calls in. We do not send clients to voicemail or use Do Not Disturb. We operate as a team to serve the customers of the agency.
- As a client of the agency, you will receive an annual renewal review call from us, and on that call, we will follow our renewal review process (coming soon!).
- The client is a delight, not a burden. We work to be the best call of the client's day.

- First call resolution is our plan A. We want to complete everything on the call (including documentation) before hanging up the phone. When we cannot, we will set a clear time to reconnect with the client and document a suspense in Epic.
- If it's not in the management system, it didn't happen.
- All phone calls and emails received will be responded to on the same day, even if only to say it's been received and set an expectation of when something will be completed.
- Clients are defined by the agency as carrier partners, internal agency team members, and policy holders.

Execute the Agency Plan

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 3: Develop - Execute the Plan
- https://knowledge.agencyperformancepartners.com/knowledge

Who should know about the Agency Assessment Leadership Checklist?	The executive team. As needed, we will pull in specific parties for specific items.
What is the plan?	The plan is customized for every agency. The plan will comprise all of the items we need to work on in your agency. We will break it down, month-by-month, with resources we can provide to assist and who will be accountable for each part. The plan will be reviewed every bi-weekly call.
When do we start the plan?	Immediately after the assessment.
How do I get the plan?	After the assessment, we will email you a copy of the plan. We will review it during the first bi-weekly call.

Agency 2.0 Planning

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment - Month 3: Develop - Agency 2.0 Planning
- https://knowledge.agencyperformancepartners.com/knowledge

Who should plan the Agency 2.0 Launch Party?	Every agency is different. The executive team should be involved in all aspects.
What is the Agency 2.0 Launch Party?	This is the day when we announce the Agency 2.0 plan to the entire team. This day is a big deal. It's the start of your 10-year vision and taking the steps to get there. It should be at least partially off site and the agency should be closed for a few hours for the meeting. This meeting should be motivational and exciting for everyone (See below for an outline of what to plan for and an agenda for the day).
When is the Agency 2.0 Launch Party?	Approximately two months after the assessment. Following the conclusion of the assessment, the date will be chosen.
Why is this date important?	This is the day you are going to stand in front of your team and announce your vision. We will clarify everything for the team and begin the process of getting the team aligned and focused on the next phase of the agency.

Agency 2.0 Planning Checklist

- ☐ Location
- ☐ Date
- ☐ Time
- ☐ Invitations
- ☐ Theme
- ☐ Decorations
- ☐ Food

- [ ] Giveaways
- [ ] Swag
- [ ] Message to the team

Agency 2.0 Agenda

- Share with the team the ideal agency structure (team leads, etc.)
- Agency metrics and dashboards
- 2023 Incentive Plan
- Agency Standards
- Issue Tracker
- Values
- Plan to work on processes and procedures (every team selects one every two months to review and execute, APP has templates).

MONTH 4

- Off-Site Meeting
- Vision
- Structure
- Metrics
- Incentives
- Fun
- Issue Tracker

MONTH 4: AGENCY 2.0

Off-Site Team Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 4: Agency 2.0
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be at the Agency 2.0 meeting?	Everyone at the agency. This is the time to help clarify your agency's vision and unite the entire team toward achieving your 10-year goal. It's important (where possible) the meeting is off-site so everyone is focused on the meeting, not the phones or email. This also shows the team that you are serious and invested in the process.

What happens during this meeting?	While every meeting should have the agency's theme and brand included, there are some non-negotiable items that we will include in the meeting, including:
	• Icebreaker: APP can provide, or the venue or agency can.
	• Agency Vision: Lead by the executive team with visual slides (APP team can help with this).
	    ○ Each team member will receive a copy.
	• Values: Lead by the executive team, everyone will take one value and share what it means.
	    ○ Each team member will receive a copy of the values.
	• Structure: Lead by the executive team, with a handout explaining who reports to who.
	    ○ We will also go over any role responsibilities at a high level here.

	- Metrics: APP-created metrics dashboard. The executive team will review the metrics and APP will be on standby for any metrics that need clarification. - Incentive: We will review the agency-wide incentive plan and small project-based incentives. - Fun: The agency will announce its plan for fun for the year. - Issue Tracker: APP & the executive leadership team will walk through the top issues and their priority. - Change Management: APP will lead a 20-30 minute training on how to deal with change. - Question & Answer period. - Everyone shares one word describing how they are feeling. - FUN activity to loosen everyone up!
When does this meeting take place?	We will select a date during your agency assessment.
Why is this meeting critical?	This is the launch of a fresh start, a time to leave the past in the past. During this meeting, you will clarify your vision for the agency and work to get everyone on board.
Where does this meeting take place?	Your agency will determine a location that is in brand for your agency and within the Agency 2.0 theme.
What happens after the meeting?	After the meeting, APP and the executive leadership team will meet and begin the next steps. The following week, each team member will meet with their leader to review their job description.

Vision Portion of the Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 4: Agency 2.0 - Vision
- https://knowledge.agencyperformancepartners.com/knowledge

Who should share the agency's vision at the meeting?	It should be the primary agency principal who shares the vision, unless there is a next-generation who is in the process of taking over. In the event the torch is being passed, it should be the next generation with FULL support of the previous ownership.

What items should we share?	APP will help you boil down your vision into a few sentences. However, to present it to the team, you will need a little more detail. Here are some things we recommend including in your agency's vision:
	
	• What will the organization look like? (culture, mood)
	• What is the target you are looking to hit?
	    ○ Revenue/Premium
	    ○ Departments and their % of the total revenue
	    ○ Locations
	    ○ Roles and positions
	• What does each year look like?
	• What kind of service do you want to model? Ideas on how to do that?
	• What advantage do you want to provide over the competition?
	• What problems are you trying to solve in insurance?
	    ○ Why does this problem need to be addressed?
	• What impact do you want to leave on your community?
	• Who are your ideal customers?
	• How will you interact with clients?

When does this take place in the meeting?	We like to lead with this after an icebreaker and welcome.

Why is sharing the vision critical?	The day-to-day can get old. Sharing the vision gives team members something to latch on to and believe in.
How is the vision displayed?	We recommend that there is a presentation as well as a handout for the team. APP can assist you with this.

Values Portion of the Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 4- Off-Site Team Meeting - Values https://knowledge.agencyperformancepartners.com/knowledge

Who should share the agency's values at the meeting?	It should be the executive team. We recommend that you each share a value for explanation.
What should we prepare for this section?	Make sure you have the values written out and provide a copy to each team member. You will want to make sure you have PowerPoint slides as well so the team can follow along. You want to have some examples of displaying the values and violating the values.
When does this take place in the meeting?	After the Vision section of the meeting.
Why is sharing the values critical?	The values are the guiding principles of the agency. You cannot cover everything in a job description, and oftentimes agencies are held back by interpersonal issues. The values are the umbrella of how you want your team to act and proceed when working with each other and clients.
How are the values displayed?	We recommend that there is a presentation as well as a handout for the team. APP can assist you with this.

Structure Portion of the Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 4- Off-Site Team Meeting - Structure
  https://knowledge.agencyperformancepartners.com/knowledge

Who should share the agency's structure at the meeting?	It should be the executive team. We recommend that you have a handout and slides to share with the agency on how the new structure will work and specifically who is accountable for what.
What should we prepare for this section?	You want to have an accountability chart ready both as a slideshow presentation and as a handout for the team. This should be the chart of who is accountable for what, titles, and a very high-level overview of responsibilities.
When does this take place in the meeting?	After the Values section of the meeting.
Why is sharing the structure critical?	In many agencies, it is unclear who handles what and who reports to who. In order to clarify this, we want to share what roles exist and what each person is responsible for.
How is the structure displayed?	We recommend that there is a presentation as well as a handout for the team. APP can assist you with this.

Metrics Portion of the Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 4- Off-Site Team Meeting - Metrics
  https://knowledge.agencyperformancepartners.com/knowledge

Who should share the agency's metrics at the meeting?	It should be the executive team. APP will be there to help clarify the metrics. This will be all visual with the APP metrics dashboards.
What should we prepare for this section?	Every member of the executive team should have reviewed the metrics and be comfortable explaining them to the group.
When does this take place in the meeting?	After the Structure section of the meeting.
Why is sharing the metrics critical?	In many agencies, there has not been a routine review of metrics—but that is about to change. We want to share with the team the initial review of the metrics as well as details on changes to workflow to ensure the metrics are accurate.
How are the metrics displayed?	We recommend that you pull up the APP dashboards and review them during the meeting. In addition, for accuracy, you will also need to create a document that explains each report and where the data comes from.

Incentive Portion of the Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 4- Off-Site Team Meeting - Incentive
  https://knowledge.agencyperformancepartners.com/knowledge

Who should share the agency's incentive plan at the meeting?	It should be the agency's primary leader. If there are any specific department incentive plans, the leader of that department may share those specific team incentives.
What should we prepare for this section?	You want to make sure that the incentive plan is clearly documented to hand out to the team. In addition, you will want visual slides for the team to follow along.
When does this take place in the meeting?	After the Metrics section of the meeting.
Why is sharing the incentive critical?	As the agency undergoes changes it is important that we recognize and motivate the team. We want them to see what is in it for them to get on board with Agency 2.0.
How are the incentives displayed?	We recommend that you have both slides and a handout for the team.

Fun Portion of the Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 4- Off-Site Team Meeting - Fun
  https://knowledge.agencyperformancepartners.com/knowledge

Who should share the agency's fun plan at the meeting?	It should be the agency's executive team. If there are any specific department fun plans, the leader of that department may share those specific team incentives.
What should we prepare for this section?	You want to have the exact plans and dates ready for the team. This is the point where we give the team specific things to look forward to. There will be a few items we hold back (everyone loves a surprise!).
When does this take place in the meeting?	After the Incentive section of the meeting.
Why is sharing the fun plan critical?	As the agency undergoes changes it is important that we let the team know that we want to balance the hard work that we need to do with team building and fun.
How is the fun plan displayed?	We recommend that you have both a slideshow presentation and a handout for the team with dates and plans.

Issue Tracker Portion of the Meeting

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment - Month 4- Off-Site Team Meeting - Issue Tracker https://knowledge.agencyperformancepartners.com/knowledge

Who should share the issue tracker at the meeting?	It should be the agency's executive team. This is the initial review of the known issues the agency has on its radar screen. Every issue brought to the agency's attention will be added to the issue tracker. The executive team will review each issue with the group and the status.
What should we prepare for this section?	APP will create an issue tracker for you to share. You should prepare a process for how team members will report issues going forward and when the issue tracker will be reviewed.
When does this take place in the meeting?	After the Fun section of the meeting.
Why is sharing the issue tracker critical?	In many agencies, issues are swept under the rug and it can cause team frustration. We want a method for confronting issues and denoting them clearly to be worked on.
How is the issue tracker displayed?	APP will create the document and have it on the screen for review. This will be a shared document so everyone can see it and receive updates on issues.

Change Management Portion of the Meeting

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 4- Off-Site Team Meeting - Change Management Training https://knowledge.agencyperformancepartners.com/knowledge

Who will present the change management section of the meeting?	APP will present this training portion of the meeting.
What should we prepare for this section?	You do not have to prepare anything, we will take care of it for you!
When does this take place in the meeting?	After the Issue Tracker section of the meeting.
Why is training the team on change management critical?	Many insurance team members have never received training on managing change and some have an aversion to change.
How is the training conducted?	We will have a slideshow presentation for the team and a handout as well.

MONTH 5

- Bi-Weekly Calls
- Execute Plan
- Issue Tracker
- Metrics/Goals
- Agency Communication/Meetings
- Fun

execution

MONTH 5: EXECUTION

Bi-Weekly Calls

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 5: Develop - Bi-Weekly Calls
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be on the calls?	The same team members who were on the original bi-weekly calls should be on these calls. We can discuss if you feel other agents should be included.
What happens during these meetings?	Now that the Agency 2.0 meeting has concluded, we will continue to review our Agency Assessment checklist. We will review how everyone is adopting the new Agency 2.0 values and goals. Before each meeting, we will send you an agenda of the items we will be reviewing and offer you the opportunity to add any new agency items to the agenda. We will review the steps that need to be completed by this meeting. We will also assign the next steps on the Agency Assessment Leadership checklist. After each meeting, we will send an email recapping the meeting along with a list of the next steps.
What if someone did not execute their Agency Assessment Leadership checklist items?	Everyone gets delayed every now and then. APP will be watching for patterns of this behavior and address them directly. When there are delays, we won't discuss the reasons. We will need to focus our energy on getting back on track and

	honoring the commitment to the agency, team, and clients to launch Agency 2.0.
Where should the meetings take place?	The meeting should take place somewhere you can speak freely. The meeting will be hosted on Zoom and the meeting information will be on the calendar invite.
How should we prepare for these meetings?	You can review the meeting notes from the previous meeting and view the agenda that will be sent out three days before each call.
What happens after each meeting?	After each meeting, we will type up notes and determine our next steps.

Note: Every call will be recorded and transcribed in case we need to refer back to them.

Execute Agency 2.0 Plans

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment - Month 5: Develop - Execute Agency 2.0
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be involved in executing the Agency 2.0 plan?	Based on the agency's accountability chart, we will assign specific agents to each part of Agency 2.0: • Vision: Is the vision being clearly displayed and reviewed at every meeting? • Agency Structure: Are team members adhering to the new roles? • Metrics: Are the metrics being sent to APP and then the dashboards shared with the team? • Incentives: Are we tracking and handing out incentives as agreed? • Fun: Is the agency having fun? • Issue Tracker: Review of the issue tracker and moving on the issues.
What happens during these meetings?	Before each meeting, we will send you an agenda of the items we will be reviewing and offer you the opportunity to add any new agency items to the agenda. We will review the items above on Agency 2.0 as well as any outstanding items from the Agency 2.0 checklist. After each meeting, we will send an email recapping the meeting along with a list of the next steps.
What if someone did not execute their portion of the Agency Assessment Leadership Checklist	Everyone gets delayed every now and then. APP will be watching for patterns of this behavior and address them directly.

or Agency 2.0 Items?	When there are delays, we won't discuss the reasons. We will need to focus our energy on getting back on track and honoring the commitment to the agency, team, and clients to launch Agency 2.0.
Where should the meetings take place?	The meeting should take place somewhere you can speak freely. The meeting will be hosted on Zoom and the meeting information will be on the calendar invite.
How should we prepare for these meetings?	You can review the meeting notes from the previous meeting and view the agenda that will be sent out three days before each call.
What happens after each meeting?	After each meeting, we will type up notes and determine our next steps.

Note: Every call will be recorded and transcribed in case we need to refer back to them.

Issue Tracker

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 5: Develop - Issue Tracker
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be involved with the issue tracker?	The team leaders and executive team should be involved with the issue tracker to: • Ensure issues are being added • Ensure issues are making progress • Decide which issues should be tackled next
What should be on the issue tracker?	Any issue that will take more than two weeks to address completely. The issue tracker becomes your quarterly objectives. Smaller items should be addressed within one week of acknowledgment.
When should we share the issue tracker?	During every bi-weekly team meeting, monthly all-hands meeting, and quarterly off-site meeting, you should review the issue tracker with the team. When an issue is resolved, there should be communication to the entire team that an issue has been resolved!
Where should we store the issue tracker?	The issue tracker should be stored in a shared area where everyone can see it. The team should not be allowed to add to the tracker—that responsibility should go to an executive or team leader.
Why is the issue tracker important?	The issue tracker is critical for the team to see progress and have transparency on issues.

Metrics/Goals

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 5: Develop - Metrics and Goals
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be involved in facilitating the metrics and goals?	During the Agency 2.0 preparation, we will determine the following roles and add them to the Accountability Chart: • Who will send the data to APP? • Who will review which reports each week? • Who will address data accuracy?
What data should we be sending and reviewing?	We will be reviewing the standard Agency Performance Reports that we request (see Month 1) plus any additional reports the agency would like to review.
When should we share the metrics?	Bi-Weekly Meetings Monthly Meeting Quarterly Off-Site Meeting When a goal is achieved!
Where should we store the metrics?	You will receive the data as a link that you can store publicly, where the team has access to it. There should be no reason to hide them! We have the ability to share the metrics on a TV if you would like.
Why are the goals and metrics important?	Data tells a story of what is happening. In addition, this will help the agency run on facts, not feelings.

Communication & Meetings

Knowledge Base Article

- Click Here
- Search: Agency Assessment - Month 5: Develop - Communication and Meetings
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be involved in facilitating the meetings?	Each meeting should have a different facilitator: • Daily Good Things Meeting: Team Leader • Bi-Weekly Department Meeting: Team Leader • Monthly All-Hands Meeting: Executive Team • Quarterly Off-Site Meeting: Executive Team & Team Leaders
What should happen in each meeting?	See below to see our sample agendas for each meeting.
When should we have the meetings?	All the meetings should be in the calendar for the year. Each meeting has a different time frame.
Where should we have the meetings?	Where possible, have them live and in person. If someone cannot attend in person, have a virtual meeting option as well but make it via video and ensure there is good sound.
Why do we need this many meetings?	As we transform, we need to stay focused on consistent and clear communication.

Good Things Meeting: Everyone is standing and it begins first thing in the morning. Everyone shares one positive impact from the day before (10-15 minutes max)

Bi-Weekly Team Meeting:

9:30-9:35	**Share 1 success** Wins Lessons

9:35-9:40	**Goals/Metrics** • Retention • Review Cancellation • New Business
9:40-9:45	**Review of Issue Tracker**
9:45-9:55	**Training**
9:55-10:00	**One Word Close**

Monthly All-Hands Meeting

- Ice breaker
- Company Updates
- Demo/Training
- Agency Metrics Review
- Recognition of Team Members Displaying Values
- Review of Agency 10-Year Vision and Progress
- Issue Tracker
- Feedback Question For Discussion
- Next Month's Priorities
- Next Month's Roadblocks
- One Word Close From Everyone

Quarterly Training

- Ice breaker
- Company Updates
- Demo/Training
- Agency Metrics Review
- Recognition of Team Members Displaying Values
- Review of Agency 10-Year Vision and Progress
- Issue Tracker
- Feedback Question For Discussion
- Next Month's Priorities
- Next Month's Roadblocks
- One Word Close From Everyone
- ++ Training from an outsider!

Fun

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment - Month 5: Develop - Fun
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be involved in making sure fun is included?	The entire executive team and leadership team needs to have a pulse on the fun factor at the agency.
What should we do for fun?	There should be fun planned for the following events: • Birthdays • Work-a-versaries • Reaching a goal • Stressful time • Quarterly fun activity • Increased work volume As for what to do, that will be customized for your agency based on your team.
When should we have fun?	Every single day!
Why do we need to plan fun?	As we transform, it's important that we balance hard work with fun. Don't discredit this step, we need to balance change with fun.

MONTH 6

- Bi-Weekly Calls
- Evaluate Team
  - Values
  - Job
  - Attitude
- Metrics/Goals
- Plan for AppX Time Management

MONTH 6: CONFIRM

Bi-Weekly Calls

In this section, we continue with the bi-weekly calls to review progress. The main goal of this month is to check in formally on how the team is adopting Agency 2.0. We want to be intentional in communicating, checking in, and correcting any misperceptions. We also want to address clearly and quickly any team members who are not fully on board with the new agency direction. We did not add a formal bi-weekly call section here as by now your agency is a pro when it comes to the bi-weekly call with APP!

Evaluate the Team

Knowledge Base Article

- Click [Here]
- Search: Agency Assessment - Month 6: Confirm- Evaluate The Team
- https://knowledge.agencyperformancepartners.com/knowledge

Who should be evaluating the team?	This should be a combination of the leadership team and the team leaders. We want to take the time to make sure the team leaders are engaged in the process, but also aware of how they understand the new vision for the agency. This is a good time for the leadership team to work with team leaders to clarify any evaluation issues.

What are we evaluating the team on?	We want to evaluate the team on three major items:
	• Agency Values
	• New Job Description (Note: This is an initial review to see where we need to invest in the agent)
	    ○ Once your job descriptions are completed, we will convert them into a review form similar to the example below
	    ○ We will also pull in their metrics so the team leader can display their personal metrics
	• Potential (this is on the Values Form below)
	
	You can see how we evaluate the team below.

When do we begin this process?	In the sixth month, we will begin the process of evaluating each team member. After the documentation is completed, the agency should have individual meetings with each team member to have a conversation on where the team member stands on the process.
How should we prepare for these meetings?	Complete the documentation for each team member and then book a meeting with each team member. Share the review and value evaluation with them.

What happens after each meeting?	Each team member should receive a recap of the conversation documented and stored in their employee file.

Agency Value Review (APP will provide this for you):

TEAM MEMBER NAME	VALUE #1	VALUE #2	VALUE #3	VALUE #4	VALUE #5	Gets It	Wants It	Capacity To Do It

Agency Job Description Review (APP will prep this form for you):

Senior Personal Lines Account Manager

Mission of the Personal Lines Account Manager

To service the book of clients by both supporting the sales team in their pursuit of new business and providing extraordinary service, educating the customer, identifying revenue growth opportunities, and generating referrals. Senior account managers focus on supporting agency growth as well as being a leader, trainer, and coach to account managers.

Desired Outcomes of this Role

	Rating 1-5 and Comments
1. General Management a. Work with the team to ensure all account reviews are done on time b. Work with the team to train and audit the account review process with the personal lines team c. Proactively reach out to clients d. Conduct ongoing account reviews e. Work with clients on their policies f. Effective account rounding g. Generate referrals h. Educate clients about the benefits of having Sava Insurance as their agency	

i. Proactively call cancelled business to try to win them back immediately j. Process policy changes	
2. Generate additional revenue on the book of business in the form of increased coverage, account rounding, adding policy features, and generating referrals for new business a. Motivate and encourage the team to account round routinely by educating customers on additional lines of coverage b. Conduct account reviews c. Suggest and sell umbrella, flood, life, recreational vehicles, and other insurance products d. Ask for referrals e. Stop, listen, and ask questions of your customers in order to clearly understand their needs and to build solid relationships	
3. Conducting account reviews a. Complete 100% of account reviews assigned to you each week, including reviewing potential discounts and coverage gaps b. Prior to remarketing, check to see If rates increase 10%, another line of coverage is received, or claim falls off of their record and provide your thorough account review to find all updates and then remarket the account	
4. Provide outstanding inbound service on claims, billing questions, and endorsements a. Work to manage clients' expectations b. Follow up with clients via phone or email c. Use every opportunity to confirm and update client information d. Educate clients on the benefits of using Sava Insurance e. Service personal lines accounts in a manner so as to eliminate gaps in coverage, thus reducing E&O exposures	
5. Possess and maintain a positive mental attitude, including positive working relationships with clients and agency personnel	
6. Work with management to create and enforce agency processes as well as be a coach and mentor to account managers	
7. Other responsibilities as directed by your manager	
Knowledge, Skills, and Abilities: • Proficient in MS Office, specifically Excel, Word, and Outlook. • Excellent oral and written communication skills. • Excellent customer relationship skills • Organized and able to work efficiently and independently ***3+ years personal lines agency experience***	

Currently have a Property & Casualty Insurance License	

Critical Competencies

		Rating 1-5 and Comments
Efficiency	Able to produce significant output with minimal wasted effort.	
Honesty/Integrity	Does not cut corners unethically. Earns trust and maintains confidence. Does what is right, not just what is easy.	
Organized & Planning	Plans, organizes, and schedules in a productive manner. Focuses on key priorities.	
Aggressiveness	Moves quickly and takes a forceful stand without being abrasive.	
Follow-Through	Lives up to verbal and written agreements, regardless of personal costs.	
Intelligence	Learns quickly. Demonstrates ability to quickly and proficiently understand and absorb new information.	
Persistence	Demonstrates tenacity and willingness to go the distance to get something done.	
Proactivity	Acts without being told what to do. Brings new ideas to the company.	
Flexibility/Adaptability	Adjusts quickly to changing priorities and conditions. Copes effectively with complexity and change.	
Calm Under Pressure	Maintains stable performance when under heavy pressure or stress.	
Enthusiasm	Exhibits passion and excitement for work. Has a can-do attitude.	
Work Ethic	Possesses a strong willingness to work hard and sometimes long hours to get the job done. Has a track record of working hard.	
High Standards	Expects personal performance and team performance to be nothing short of the best.	
Openness to Criticism and Ideas	Often solicits feedback and reacts calmly to criticism or negative feedback.	
Listening Skills	Lets others speak and seeks to understand their viewpoints.	
Communication	Speaks and writes clearly and articulately without being overly verbose or talkative. Maintains this	

	standard in all forms of written communication, including emails.	
Teamwork	Reaches out to peers and cooperates with supervisors to establish an overall collaborative working relationship.	
Persuasion	Able to convince others to pursue a course of action.	
Requirements	Currently licensed in insurance and possesses 5+ years of experience working in the insurance industry.	

Plan for AppX Time Management

The final step for the month is to work with the APP team to get the time management program up and running. We will send you another guide on this program.