**Employee Benefits Producer – Proficiency Definition**

**Professionalism**

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| **Proficiency Statement** | **Milestone** |
| 1. Demonstrates expected work habits and discipline to accomplish position goals. | Month 1 |
| 1. Follows company values and principles including demonstrating cultural competencies with our staff, carriers and clients. | Month 1 |
| 1. Accepts and acts on coaching, guidance and feedback from mentor and team members to accelerate development and adopt best practices. | Month 2 |
| 1. Takes full advantage of agency technology and resources to enhance efficiency | Month 3 |
| 1. Builds positive and productive working relationships with other members of the team and within the community. | Month 3 |
| 1. Shows preparation including acting professionally, researching the client and industry, and dressing appropriately in all interactions with clients | Month 4 |
| 1. Builds expertise including business, group and individual health insurance, other employee benefits and related regulations and trends. | Month 6 |

**Pipeline Development**

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| **Proficiency Statement** | **Milestone** |
| 1. Uses CRM to enhance efficiency, manage prospecting activities and track sales activities. | Month 1.5 |
| 1. Uses sales planning tools, scripts and systems for pipeline development and management of prospecting activities | Month 2 |
| 1. Develops and implements a clear objective and plan for each meeting or phone call with a prospect/client. | Month 2 |
| 1. Devotes at least 8 hours per week to making prospecting/cold calls to secure initial meetings. | Month 2 |
| 1. Builds and maintains a pipeline of 150 “washed” suspects in CRM of at least $10,000 in revenue each. | Month 3 |
| 1. Schedules and conducts at least 20 initial meetings with prospects per month. | Month 3 |
| 1. Schedules and conducts at least 8 Center of Influence / Networking meetings per month to develop referral sources and create visibility. | Month 3 |
| 1. Uses effective questioning and listening to build rapport, identify needs, and qualify opportunities. | Month 4 |
| 1. Leaves each initial meeting with a clear plan of action of next steps. | Month 4 |
| 1. Seeks and leverages internal and external coaches to advance sales efforts within targeted accounts. | Month 4 |
| 1. Involves appropriate internal resources and experts in prospect/client meetings and presentations in a manner that brings significant value to the meeting, prospect/client, and our agency. | Month 4 |
| 1. Briefs team members prior to prospect/client meetings regarding objective and role they will play in the meeting. | Month 4 |
| 1. Handles prospect and client interactions like a professional advisor. | Month 5 |
| 1. Engages and builds rapport and connects with decision makers and influencers by getting prospects to commit their personal time in activities such as dinner, hunting, golf, etc. | Month 6 |

**Sales Presentations**

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| **Proficiency Statement** | **Milestone** |
| 1. Differentiates our agency from the competition during the sales presentation including multiple ways we address business and human resources priorities better than competitors in order to compete on value versus price alone. | Month 4 |
| 1. Briefs team members prior to the presentation regarding meeting objectives and the expected role they will play in order to maximize time available. | Month 4 |
| 1. Leaves each presentation or meeting with a clear plan of action including prospect/client commitment to next steps. Examples of next steps include Review of Current Program, Sites Visits, Handbook Review, Policy Review and contract review. | Month 4 |
| 1. Rehearses entire sales presentation with one or more team members before presenting resulting in high quality presentation. | Month 4 |
| 1. Delivers effective sales presentations at the executive level and other appropriate levels of the organization. | Month 5 |
| 1. Makes at least 2 closing presentations per month (or six per quarter) | Month 4 |
| 1. Delivers organized and concise presentations focused on the client while speaking clearly and tailoring the presentation to the buyer’s style | Month 4 |
| 1. Wins business from at least 50% of closing presentations with prospects. | Month 6 |
| 1. Achieves first sale to a mid-market target account ($10,000 or more in annual revenue to the agency) | Month 7 |

**Solutions**

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| **Proficiency Statement** | **Milestone** |
| 1. Makes a meaningful contribution to accurate identification of prospect human resources and employee benefits issues and creation of an on-target solution to address them | Month 6 |
| 1. Explains industry and technical issues clearly and accurately for given audience. | Month 6 |
| 1. Refers/initiates cross-selling of agency services and solutions that are appropriate to prospect/client needs to maximize client retention and satisfaction. | Month 7 |
| 1. Demonstrates understanding of each health insurance carrier’s offerings, unique capabilities, and strengths and weaknesses versus other carriers | Month 7 |
| 1. Adheres to standardized workflow for proposals, and marketing submissions | Month 7 |