

Quick-Start Proficiency Definition

P&C Producer

Category: Professionalism

Sign-Off	Proficiency Statement	Milestone	Evaluation
	1. Demonstrates expected work habits and discipline to accomplish position goals.	Month 1	<ul style="list-style-type: none"> Review with producer behavior checklist
	2. Follows company values and principles including demonstrating cultural competencies with our staff, carriers and clients.	Month 1	<ul style="list-style-type: none"> Sales Leader feedback from Team Members and Carriers
	3. Accepts and acts on coaching, guidance and feedback from mentor and team members to accelerate development and adopt best practices.	Month 2	<ul style="list-style-type: none"> Mentor, Team Member observation
	4. Takes full advantage of agency technology and resources to enhance efficiency	Month 3	<ul style="list-style-type: none"> Feedback from the Team
	5. Builds positive and productive working relationships with other members of the team and within the community.	Month 3	<ul style="list-style-type: none"> Sales Leader feedback from Team Members
	6. Shows preparation including acting professionally, researching the client and industry, and dressing appropriately in all interactions with clients	Month 4	<ul style="list-style-type: none"> Direct observation on sales calls, spot audit of prep and research
	7. Follows the steps necessary to bind coverage.	Month 5	<ul style="list-style-type: none"> Feedback from the Team Direct Observation on Sales Calls
	8. Identifies a focus or specialty/practice group to focus sales efforts and build expertise.	Month 6	<ul style="list-style-type: none"> Mentor, Practice Group Leaders, presentation, white paper competencies
	9. Builds expertise including business, business insurance and risk management trends.	Month 6	<ul style="list-style-type: none"> Feedback from team and Coaching Individual and group training participation and progress

Category: Pipeline Development

Sign-Off	Proficiency Statement	Milestone	Evaluation
	10. Uses CRM to enhance efficiency, manage prospecting activities and track sales activities.	Month 1.5	<ul style="list-style-type: none"> Sales Leader pipeline and activity report review
	11. Uses sales planning tools, scripts and systems for pipeline development and management of prospecting activities	Month 2	<ul style="list-style-type: none"> Review of recorded calls or Sales Leader reviews
	12. Develops and implements a clear objective and plan for each meeting or phone call with a prospect/client.	Month 2	<ul style="list-style-type: none"> Pre-Call Plans Coach/Mentor observation
	13. Devotes at least 8 hours per week to making prospecting/cold calls to secure initial meetings.	Month 2	<ul style="list-style-type: none"> Review and discussion with Production Manager
	14. Builds and maintains a pipeline of 150 "washed" suspects in CRM of at least \$7,500 in revenue each.	Month 3	<ul style="list-style-type: none"> Sales Manager verifies in Sales Force
	15. Schedules and conducts at least 20 initial meetings with prospects per month.	Month 3	<ul style="list-style-type: none"> Sales Leader activity report review
	16. Schedules and conducts at least 8 Center of Influence / Networking meetings per month to develop referral sources and create visibility.	Month 3	<ul style="list-style-type: none"> Sales Leader activity report review
	17. Uses effective questioning and listening to build rapport, identify needs, and qualify opportunities.	Month 4	<ul style="list-style-type: none"> Direct observation on sales calls
	18. Leaves each initial meeting with a clear plan of action of next steps.	Month 4	<ul style="list-style-type: none"> Sales Leader Review
	19. Seeks and leverages internal and external coaches to advance sales efforts within targeted accounts.	Month 4	<ul style="list-style-type: none"> Monthly Coaching session
	20. 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	<ul style="list-style-type: none"> Sales Leader Feedback from Team Members
	21. Briefs team members prior to prospect/client meetings regarding objective and role they will play in the meeting.	Month 4	<ul style="list-style-type: none"> Sales Leader Review / Team Feedback
	22. Handles prospect and client interactions like a professional advisor.	Month 5	<ul style="list-style-type: none"> Direct observation on calls and from Production Manager
	23. 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	<ul style="list-style-type: none"> Monthly Coaching session

Category: Sales Presentations

Sign-Off	Proficiency Statement	Milestone	Evaluation
	24. Differentiates our agency from the competition during the sales presentation including multiple ways we address risk and business priorities better than competitors in order to compete on value versus price alone.	Month 3	<ul style="list-style-type: none"> Sales Leader review of differentiators.
	25. 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	<ul style="list-style-type: none"> Sales Leader Feedback from Team Members
	26. Leaves each presentation or meeting with a clear plan of action including prospect/client commitment to next steps. Examples of next steps include Audit Action Plan, Sites Visits, Handbook Review, Policy Review and contract review.	Month 4	<ul style="list-style-type: none"> Sales Leader review of action plan.
	27. Rehearses entire sales presentation with one or more team members before presenting resulting in high quality presentation.	Month 4	<ul style="list-style-type: none"> Sales Leader review of presentation
	28. Delivers effective sales presentations at the executive level and other appropriate levels of the organization.	Month 5	<ul style="list-style-type: none"> Sales Leader review. Preview presentation with Sales Leader.
	29. Makes at least 2 closing presentations per month (or six per quarter)	Month 4	<ul style="list-style-type: none"> Sales Leader review of monthly activity report.
	30. Delivers organized and concise presentations focused on the client while speaking clearly and tailoring the presentation to the buyer's style	Month 4	<ul style="list-style-type: none"> Direct observation on sales calls and role play
	31. Wins business from at least 50% of closing presentations with prospects.	Month 6	<ul style="list-style-type: none"> Track sales activities
	32. Achieves first sale to a mid-market target account (\$7,500 or more in annual revenue to the agency)	Month 7	<ul style="list-style-type: none"> Sales Activity Report

Category: Solutions

Sign-Off	Proficiency Statement	Milestone	Evaluation
	33. Makes a meaningful contribution to accurate identification of prospect risk management and insurance issues and creation of an on-target solution to address them	Month 6	Sales Leader review of Meeting Notes, Proposal and/or Closing Presentation, and Team Feedback
	34. Explains industry and technical issues clearly and accurately for given audience.	Month 6	Sales Leader review of Insurance Proposal. Feedback from Client Executive
	35. Refers/initiates cross-selling of agency services and solutions that are appropriate to prospect/client needs to maximize client retention and satisfaction.	Month 7	Sales Leader review of Sales Activity Report and Team Feedback
	36. Demonstrates understanding of each carrier's expertise and current appetite within certain industries.	Month 7	Direct observation on sales calls and presentations. Feedback from team
	37. Adheres to standardized workflow for proposals, and marketing submissions	Month 7	Feedback from the Team