P&C Producer Quick-Start Proficiency Definition

Category: Professionalism

Sign-Off	Proficiency Statement	Milestone	Evaluation
	1. Follows all standards for business etiquette and producer professional ethics.	Month 1	• Direct observation by mentor using ethics guidelines
	2. Follows company values and principles when working with clients, staff and carriers.	Month 1	• Feedback from Team Members and Carriers
	3. Establishes productive work habits and sales discipline that follows the sales process.	Month 2	• Direct observation by mentor using checklist
	4. Seeks and acts on coaching and feedback from a mentor, experienced producers and staff.	Month 2	• Mentor, Team Member observation
	5. Builds positive and productive working relationships with team members, clients and carriers.	Month 3	• Feedback from Team Members
	6. Keeps current and builds expertise in business, business insurance and risk management trends.	Month 6	• Discussion with mentor

Category: Prospecting

Sign-Off	Proficiency Statement	Milestone	Evaluation
	7. Builds and maintains a business plan that identifies target accounts and market niches and sets goals for creating and maintaining a pipeline.	Month 3	• Business plan review by mentor
	8. Builds and maintains a pipeline of 150 “washed” suspects in CRM of at least $7,500 in revenue each.	Month 3	• Verified by CRM
	9. Devotes at least 8 hours per week identifying new prospects and calling to schedule appointments.	Month 2	• Review and discussion with Production Manager
	10. Schedules 20 initial meetings with prospects per month.	Month 3	• Sales activity report review by mentor
	11. Attends 8 networking meetings per month to develop referral sources and create visibility.	Month 3	• Sales activity report review by mentor
	12. Uses social networking sites to identify prospects, conduct research and identify decision makers while following social media guidelines.	Month 3	• Review by mentor
	13. Engages and builds rapport and connects with decision makers and influencers by getting prospects to commit their personal time in activities.	Month 4	• Review by mentor
	14. Uses sales planning tools, scripts and systems for pipeline development and management of prospecting activities	Month 2	• Review of recorded calls or Sales Leader reviews

Category: Initial Meetings with Prospects

Sign-Off	Proficiency Statement	Milestone	Evaluation
	15. Develops and implements a clear objective and plan for each initial meeting with prospects.	Month 2	• Pre-Call Plans • Mentor observation
	16. Follows the steps and guidelines of the Initial Meeting with Prospect checklist.	Month 3	• Mentor review with checklist
	17. Conducts initial meetings at the executive level and other appropriate levels of the organization.	Month 5	• Sales Leader review. Preview presentation with Sales Leader.
	18. Seeks and leverages internal and external coaches to advance sales efforts within targeted accounts.	Month 4	• Monthly review meetings with mentor
	19. Uses effective questioning and listening to build rapport, identify needs, and qualify opportunities.	Month 4	• Direct observation on sales calls
	20. 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	• Mentor review of differentiators.
	21. 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 call debriefing by mentor
	22. Leaves initial meetings with a clear plan of action including a commitment to next steps.	Month 4	• Mentor review of action plan.

Category: Closing Meetings with Prospects

Sign-Off	Proficiency Statement	Milestone	Evaluation
	23. Follows the steps and guidelines of the Closing Meeting with Prospect checklist.	Month 6	• Mentor review with checklist
	24. Makes at least 2 closing presentations per month.	Month 6	• Sales Leader review of monthly activity report.
	25. 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	• Sales Leader Feedback from Team Members
	26. 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	• Sales Leader Feedback from Team Members
	27. Rehearses entire closing meeting with one or more team members before presenting resulting in high quality presentation.	Month 4	• Mentor review of presentation
	28. Explains industry and technical issues clearly and accurately for given audience.	Month 6	• Review proposals. Feedback from Client Executive
	29. Makes first sale to a mid-market target account ($7,500 or more in annual revenue to the agency	Month 6	• Sales Activity Report

Category: Closing Meetings with Prospects

Sign-Off	Proficiency Statement	Milestone	Evaluation
	30. Wins business from at least 50% of closing presentations with prospects.	Month 7	• Track sales activities
	31. Adheres to standardized workflow for proposals, and marketing submissions	Month 6	• Feedback from the Team
	32. Follows the steps necessary to bind coverage.	Month 6	• Feedback from the Team

Category: Relationship Management

Sign-Off	Proficiency Statement	Milestone	Evaluation
	33. Uses agency technology to record, manage and report sales activities.	Month 2	• Review of Sales Activity
	34. Refers/initiates cross-selling of agency services and solutions that are appropriate to prospect/client needs to maximize client retention and satisfaction.	Month 7	• Mentor review of Sales Activity