

RHSB Proficiency Definition

Category: Professionalism

Sign-Off	Proficiency Statement	Milestone	Evaluation
	1. Follows all standards for business etiquette and producer professional ethics.	Month 1	<ul style="list-style-type: none"> Direct observation by mentor using ethics guidelines
	2. Follows company values and principles when working with clients, staff and carriers	Month 1	<ul style="list-style-type: none"> Feedback from Team Members and Carriers
	3. Establishes productive work habits including a professional sales discipline.	Month 2	<ul style="list-style-type: none"> Direct observation by mentor using checklist
	4. Seeks and acts on coaching and feedback from a mentor, experienced producers and staff.	Month 2	<ul style="list-style-type: none"> Mentor, Team Member observation
	5. Builds positive and productive working relationships with team members, clients and carriers.	Month 3	<ul style="list-style-type: none"> Feedback from Team Members
	6. Keeps current and builds expertise in business, business insurance and risk management trends.	Month 6	<ul style="list-style-type: none"> Discussion with mentor

Category: Prospecting

Sign-Off	Proficiency Statement	Milestone	Evaluation
	7. 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
	8. Devotes at least 8 hours per week identifying new prospects and calling to schedule appointments.	Month 2	<ul style="list-style-type: none"> Review and discussion with Production Manager
	9. Builds and maintains a business plan that identifies target accounts and market niches and sets goals for creating and maintaining a pipeline.	Month 3	<ul style="list-style-type: none"> Business plan review by mentor
	10. Builds and maintains Pipeline of Prospects including 150 Leads, 60 Accounts and 15 "Opportunities"	Month 3	<ul style="list-style-type: none"> RHSB prospect categories definitions CRM verification
	11. Schedules 8 Initial Meetings with Prospects per month.	Month 3	<ul style="list-style-type: none"> Sales activity report review by mentor
	12. Attends 4 networking / COI meetings per month to develop referral sources and create visibility.	Month 3	<ul style="list-style-type: none"> Sales activity report review by mentor
	13. Uses social networking sites to identify prospects, conduct research and identify influencers and decision makers while following social media guidelines.	Month 3	<ul style="list-style-type: none"> Review by mentor
	14. Connects, engages and builds rapport with decision makers and influencers by spending personal time with them in allowable non-work activities of mutual interest.	Month 4	<ul style="list-style-type: none"> Review by mentor

Category: Initial Meetings with Prospects

Sign-Off	Proficiency Statement	Milestone	Evaluation
	15. Develops and implements a clear objective, completes a POSI and has a plan for each Initial Meeting with a prospect.	Month 2	<ul style="list-style-type: none"> Pre-Call Plans Mentor observation
	16. Follows the steps and guidelines of the Initial Meetings with Prospects checklist.	Month 3	<ul style="list-style-type: none"> Mentor review with checklist
	17. Seeks and leverages internal and external coaches to advance sales efforts within targeted accounts.	Month 4	<ul style="list-style-type: none"> Monthly review meetings with mentor
	18. 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
	19. Leaves initial meetings with a clear plan of action including a commitment to next steps.	Month 4	<ul style="list-style-type: none"> Mentor review of action plan.
	20. Conducts initial meetings 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.
	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	<ul style="list-style-type: none"> Sales call debriefing by mentor

Category: Closing Meetings with Prospects

Sign-Off	Proficiency Statement	Milestone	Evaluation
	22. 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
	23. 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
	24. Rehearses sales presentations with one or more team members before presenting resulting in high quality presentation.	Month 4	<ul style="list-style-type: none"> Mentor review of presentation
	25. Differentiates your agency from the competition during sales presentations including multiple ways your agency addresses risk and business priorities better than competitors in order to compete on value versus price alone.	Month 3	<ul style="list-style-type: none"> Mentor review of differentiators.
	26. Follows the steps and guidelines of the Closing Meetings with Prospects checklist.	Month 6	<ul style="list-style-type: none"> Mentor review with checklist
	27. Conducts at least 2 Closing Meetings with Prospects per month.	Month 6	<ul style="list-style-type: none"> Sales Leader review of monthly activity report.
	28. Explains industry and technical issues clearly and accurately for given audience.	Month 6	<ul style="list-style-type: none"> Review proposals. Feedback from Client Executive

	29. Adheres to standardized workflow for proposals, and marketing submissions	Month 6	<ul style="list-style-type: none"> Feedback from the Team
	30. Follows the steps necessary to bind coverage.	Month 7	<ul style="list-style-type: none"> Feedback from the Team
	31. Makes 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
	32. Wins business from at least 50% of Closing Meetings with Prospects.	Month 7	<ul style="list-style-type: none"> Track sales activities

Category: Relationship Management

Sign-Off	Proficiency Statement	Milestone	Evaluation
	33. Uses agency technology to record, manage and report sales activities.	Month 2	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Mentor review of Sales Activity
	35. Establishes and leads implementation of a service plan with each client that is clear and consistent with client and agency expectations	Month 7	<ul style="list-style-type: none"> Account service plans Client feedback
	36. Maintains effective communication with clients after the sales to stay current on changes in their business, risk management and insurance needs, and level of satisfaction	Month 7	<ul style="list-style-type: none"> Account service plans Client feedback