

NEW YEAR, NEW AGENCY

Setting and Achieving
Goals for Your Independent
Insurance Agency



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There is a reason why so many people make resolutions before the start of a new year:

A BLANK SLATE.

The idea that you can start anew is liberating, and holds so much promise for success. You and your independent insurance agency can take advantage of this new beginning!

In this eGuide we'll explore the ways in which you and your agency can set and meet goals for this year (and beyond).

Three light blue, semi-transparent arrows pointing upwards, arranged in a slightly curved path from left to right. They are positioned behind the text.

Start New Habits



Be service minded

Think of your clients first! Start off the New Year by reprioritizing your clients, and recommitting to providing the best service. Identify 2 new things you can do this quarter to improve service and focus on making them part of your culture.



Get a routine

Work towards structure in your day to ensure you get things done and stay sane. Be sure to be realistic about how much time you need for a task.



Recharge

Be sure to schedule in breaks – you're going to need a moment to recharge to stay efficient.



Commit to something new

Brainstorm with your staff to set goals to better your agency, and start working towards one or two goals for the year.



Don't be afraid to start small

Once you've identified your goals, start chipping away at them in small, manageable chunks.



Communicate early and often

By committing to communicate early and often, you can insure information is flowing and that everyone is on the same page: a recipe for great results.



Get organized

Clean off your desk, your office, your inbox... and make a plan (or get the tools and/or help you need) to keep a clean slate.



Set Goals

Positive change only takes place with clear direction. Start out by setting clear goals, for yourself and your agency, to get yourself on the path to improvement. Here are a few simple steps to goal-setting success:

| | For You | For Your Agency |
|--|---|---|
| <p>GET THE GOAL, TOGETHER Ask for input when creating your goals. Spitball ideas with others by creating lists, mind maps, or even a “brain dump” by writing down any small ideas that come to mind.</p> | Consult a group of friends, your spouse, or family members | Ask employees for individual input and host department or whole agency workshops |
| <p>START BIG, AND BREAK IT DOWN Where do you see yourself/your agency in 10 years? After you have that vision, think about what you need to do in 5 years, 1 year, 1 month, etc. When you introduce a daily goal as part of a big picture, you set a good pace for success.</p> | Think of professional, personal, financial, and health goals | Focus on customer service, commercial lines, personal lines, individual agents |
| <p>MAKE GOALS SPECIFIC, MEASURABLE, AND ATTAINABLE Be reasonable in your goals – don’t set them too high that you are sure to fail. Also, be clear in what you want to achieve, and think about a way to gauge whether or not you have met success.</p> | Recognize your constraints—be reasonable about your finances and acknowledge commitments to work and family | Know market changes and other unpredictable elements can affect your goals |
| <p>REMIND YOURSELF When you keep your goals at the top of your mind, you are more likely to stay motivated to achieve them. Also, showing progress through checkpoints will build momentum.</p> | Pin goals to your mirror, and add check points to your planner | Hang your goals where all staff can see them, and update goals as progress is made |
| <p>CELEBRATE SUCCESS When you celebrate, you build motivation to continue on to other goals. It’s important to acknowledge your improvements to build morale, which leads to a happier, more successful you!</p> | Take yourself out, go on a trip, grab an extra special latte—anything to reward yourself for your hard work | Plan an all office outing, or order in a special lunch—anything to make a big deal about success! |



Mark Success



One of the best ways to encourage continual goal achievements is to celebrate successes. Here are some ways to celebrate each milestone to keep your motivation up and your agency improving:



Treat them

Take staff out to lunch or dinner. Make it extra special by inviting an important connection to join.



Add a personal touch

Take the time to write down exactly what it is you appreciate about the individual, and add in a thoughtful gift card to their favorite restaurant or coffee place.



Make it public

Start regular “award sessions” to highlight the good work of staff or associates who have gone above and beyond. Display winners’ names in the office, reminding everyone that good work does not go unnoticed.



Give extra perks

Little perks can go a long way. Offer extra vacation time, flexible work hours, or work from home options to show you value their commitment to your agency.



Take it to the bank

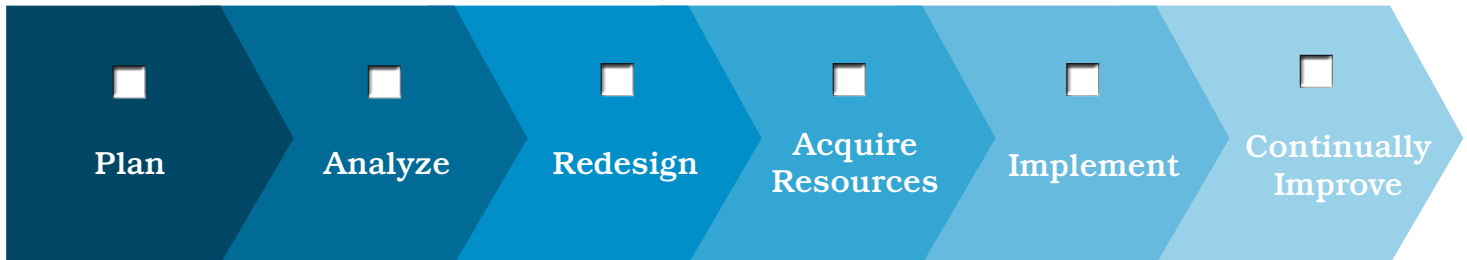
Bonuses and raises remain one of the best ways to show your staff and associates that their work is appreciated.



**Reevaluate, Revise
and Repeat!**

Progress and change are not onetime projects—you'll need to check in with your goals on a regular basis and see where you stand. Once you've assessed your achievements, you will need to make any changes and set new goals to keep on track. Improvement is an ongoing process that takes commitment and hard work, and your agency should plan to continually recommit to improvement throughout the year.

As you work to set goals for yourself and your agency, you may find it difficult for yourself or others to accept change. We at SIS know change is hard, and are here to support you in improving your agency as we strive to provide you with the best agency management system experience. To find out more about how SIS can help your agency work towards your goals, contact us at sales@sisware.com. We look forward to hearing from you!





About SIS

Headquartered in Columbus, Ohio, Strategic Insurance Software (SIS) is the team behind Partner XE— an innovative web-based insurance agency management system that helps independent agencies streamline workflow and grow their business. Built on a foundation of strong technology and exceptional service, we're moving forward with a constant eye on innovation that will make independent agents' lives easier.

About Partner XE

Supporting downloads from nearly 300 carriers, real time interaction, integrated agency accounting, and much more, Partner XE is a full-featured agency management system at an affordable cost for the independent insurance agency. For more information, please visit www.sisware.com

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