

Most organizations don't succeed at the level they should and don't reach their potential because of a lack of organizational clarity & accountability.

A **strong, clear vision** of where you're going and the **accountability** to make it happen allows you to progress rapidly. When you are able to focus on the projects and activities that generate **desired results**, you'll find yourself continually creating new levels of **success**.

—Kevin Trokey, **President & Coach**, Benefits Growth Network



Communicating the Purpose, Vision, Values

Actively engaging employees in the success of your business is a key factor to achieving consistent results. In order for employees to jump on board and take an active role in driving the results, they must fully understand and support the mission of the company, and, as importantly, they need to understand how their individual roles impact the results.

This is achieved through clear and repeated communication of the purpose, vision, and values of the company.

purpose why you are in business

vision where your business is going

values which drive cultural behaviors

As a business leader, it is your job to clearly define and consistently communicate this to the team. Great business leaders accomplish goals because they articulate the vision, lead the team by example, and empower others to do the same.

Gather your leadership team and go through these exercises to **create a culture driven by accountability and a passionate focus on delivering results.**

Clarify the Purpose

Get down to the root level of the purpose for your business. Sure you're an insurance agency, but what is it that you are promising to your clients?

- Medical policies?
- Quality products?
- Customer service?
- Employee management consulting?
- Business solutions?

An effective message has to be built around what makes your company special and unique in the marketplace. It has to be focused **not on describing what your company does**, but rather **on the difference you make for you clients when you do what it is you do**. It has to be built around a core purpose from which the employee can draw some level of passion and pride when speaking on your behalf.

Think about Southwest Airlines. In describing what they do, it would be fair to say that they are a transportation company, moving people. Instead, Southwest sees itself as being in the customer service business. For any particular passenger, they may be serving the need to reunite with a family member, close a deal, or to escape to a favorite vacation spot. Instead of focusing on simply delivering people from one place to another, Southwest reminds their employees that what they are really delivering is a customer service experience focused on “a sense of warmth, friendliness, individual pride, and Company Spirit”.

Once you understand the fundamental function of your business, then creating a vision and values in support of that purpose becomes very clear: you now have a benchmark for measuring company decisions.

If you've chosen "customer service" as your purpose, then when faced with a decision point – big or small – the one in favor of "customer service" should win.

Each action, project, new hire, and budget line item should be in support of "customer service". If it's not, then you should consider eliminating it.

When the leadership and employees all understand this evaluation/decision mechanism, then **making & communicating decisions becomes much easier for everyone at all levels of the company.**

Create the Vision

Before you can become the agency for which you strive to be, it is critical to have clarity about what that future looks like. Organizations with a clear vision of what the company will look like in the future move faster and with greater purpose and confidence.

A vision isn't a flowery statement to be framed and hung on the conference room wall or written on a web site. Rather it is a rallying point and road map to keep the team focused and moving as one toward the goal.

We break the vision into two distinct parts that drive one another:

Qualitative Vision & Quantitative Vision.

Qualitative Vision

The qualitative vision focuses on company culture – what qualities do you want to have and enforce within your organization? Look at the systems & processes within the company and **understand what thoughts & behaviors are positively or negatively influencing the results.**

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Use this qualitative vision section to paint a picture of what you want the company to look like at an identified point in the future (1 & 3 years).

Step 1

Make the new vision a reality by identifying critical areas needed for a results-driven culture, and describe in detail:

A) what you look like today

B) what you look like in the future

Some critical areas you may include for your Qualitative Vision:

Results Impact Item	Current Situation	Future Vision
Agency leaders set example with continuous prospecting		
All positions have an accountability structure to meet identified goals		
Job/skill alignment for all positions		
Sales process focused on serving client needs rather than on selling products		
Producers focused on sales & account management focused on service		
Producers develop annual plans for behaviors & results		
All team members have personal development plans to drive motivation and career development		

Quantitative Vision

The quantitative vision includes the measurable items, or critical indicators, that allow you to measure the results of your efforts.

Step 2

Again, start by identifying **where you are currently** and commit to the standard you will meet at **a defined point in the future**. Those vision numbers need to be achievable and believable, yet challenging enough that their achievement will require focus and determination from the whole team.

Some critical indicators you may include in your Quantitative Vision:

Critical Indicator	Current Situation	Future Vision
Total Revenue		
Revenue Growth as a %		
EBITDA		
Revenue per Employee		
Revenue per Producer		
Revenue per Relationship		
Closing Ratio		

The **momentum** that can be achieved with a **single, unifying vision** is powerful. **Share your vision** repeatedly with **everyone** in the organization, and make sure they know it as well as you do.

Determine the Values that Drive the Culture

7 Cultural Issues that will Drive Sales Results

An agency or brokerage is a sales organization. Without consistent productivity from the sales team, the agency will, at best, plateau and eventually will slip backward. Creating the culture that places a high value on the importance of the sales process separates the average agencies from the great ones.

In a sales culture, all employees actively participate in the selling process and client experience. Each person understands:

A how his or her role **contributes to** the development and maintenance of **client relationships** and

B that **creating value for clients** is the number one goal of the organization

*Regardless of the specific Purpose you've defined, creating value for the client is relevant & vital.

In order to develop the desired culture, the **leader** must **live the company values** and require **all team members** to do so, as well.

1.

Leaders lead by example In most agencies, the leaders still have sales responsibilities. The way those leaders approach the sales process will be the same way the sales team approaches the sales process. If you want a culture of discipline, continuous prospecting, and a sales team that defers to the account management team for service issues, then the leader must demonstrate those behaviors.

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2.

Accountability Every person in the agency should be held accountable for driving his or her respective results. Be sure everyone has a performance plan with clearly defined goals and objectives, and there are monthly check-ins to measure the progress and make one-on-one connections.

3.

Have everyone in the right role Matching individual skills to the necessary skills for a position is imperative. If you've got someone who is mismatched, you need to make a change – either move that person to an appropriate role or make the hard decision to let him or her go. This includes producers. If a person does not or is not able to adhere to the job description of continuous prospecting and bringing in new business, they are not a producer – move them to account management or move them out.

4.

Properly define success and celebrate the progress Success in each step of your sales system should be defined as getting the prospect to the next step. Celebrate each of these victories, and don't wait to celebrate only the final sale. Success is addictive – make it a regular part of everyone's day and feel the momentum build.

5.

Producer confidence Selling is a transfer of confidence, confidence that you are offering a better solution; however, you can't give away what you don't have. Be sure your agency processes and culture support these three requirements for producer confidence: **1.** Being able to take a prospect through a value-driven sales process. **2.** A full pipeline of prospects. **3.** Knowing that you have the team and solutions to make a difference for the future client.

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6.

Proactive vs. Reactive Plan what you and/or your agency will do to drive results rather focusing on what has already taken place. Sure, take a look at the end results, learn what lessons you can, and but then focus your efforts toward the behaviors and actions that will influence future results.

7.

Understanding the “why” Until a producer truly understands his/her motivation, it will be difficult, at best, to keep the proper focus and determination (Hint: It is never money. It may be what money can allow you to do, but it isn't the money itself.). During the producer planning process, take the time to find out what his or her true motivation is, and keep that top-of-mind for him throughout the year.

Create the Accountability to Support the Vision

Cascade the company vision and make it relevant to each person in the organization.

To be sure you are bringing the vision to life, there must be accountability built into the culture of the organization. While it is the leader's job to repeatedly communicate the vision of the company, everyone has responsibilities to contribute to the overall vision. Knowing how it connects to individual roles is the key to driving that engagement.

Supervisors need to proactively manage employees by engaging with them in a meaningful and productive way *and* tie their roles to the goals of the company. Use performance objectives to help employees take responsibility for their own success, and you will feel the results in their level of engagement, as well as in the positive impact on your company's productivity and profitability.

Performance objectives:

- Help a company meet goals
- Help employees be more productive
- Assist in giving one-on-one communication
- Help employees be successful
- Give direction to management on financial increases

Performance objectives are not:

- A tool used just for compensation
- A system to find where employees are not doing their job
- A system to grade people

Start cascading communication by

sharing the Purpose, Vision & Values, and then break those down to measurable & achievable goals, objectives, behaviors, and tasks needed to achieve the vision.

Identify & Communicate:

- **Organizational goals** – What are we going to accomplish?
- **Organizational objectives** – What results are needed to hit goals?
- **Organizational behaviors** – How do we need to conduct ourselves to hit objectives?
- **Organizational tasks** – What job description activities are needed to hit objectives?

Goals We start by understanding the goals of the company. This is what drives the subsequent objectives and tasks we expect employees to perform. The goals tend to focus on profitability, employee satisfaction, client satisfaction, and/or growth. The example here could be for the company to create a minimum of 20% annual, organic growth (use the information from your Quantitative Vision).

Critical Link: *Connect the Individual to the organization with performance objectives.*

Objectives This defines the results you want your employees to strive to achieve, and they are based on the goals of the company. For a producer, this may be to work on high-probability prospects, resulting from formal introductions.

Tasks These are the daily activities for which an employee is responsible, and they're usually included in the job description. An example for a producer may be to build a network of individuals whom she can count on for those introductions.

Objectives should be SMART

- **Specific** Who? (producer), What? (write \$100K), When? (2011)
- **Measurable** Numbers, frequencies, timelines
- **Attainable** Reasonable, yet challenging
- **Relevant** Has to be a difference-maker
- **Trackable** Must be monitored and reportable

Managing Performance Objectives

Now that you've written the objectives, it's time for everyone to **get to work**. And for the supervisor, it means having a monthly one-on-one with each employee. If everything has been set up properly, these check-ins should last no more than 10 or 15 minutes. The purpose isn't for a full-out review, but just to look at the performance data that the employee has tracked for the last month. It is the supervisor's responsibility to provide guidance on what the employee can be doing next and to give recognition for what he has already accomplished.

The monthly one-on-one sessions are imperative to connecting and engaging with your employees. These sessions provide an opportunity to develop a stronger bond with the supervisor and the company.

This time investment creates great payback at year-end because you've been monitoring performance throughout the year, making the annual review just that – a review of what has already been discussed. These annual sessions now become an excellent time to work on future planning and development for each employee.

Properly measured objectives use a **well-defined measurement scale**, which takes the uncertainty of performance out of the equation. When establishing your measurement scale, it is important that "expected" isn't at the top, it lies in the middle. There needs to be a mutual understanding of what outcomes are reflected at each level.

Measurement scale

- 5** - Far exceeds expectations
- 4** - Exceeds expectations
- 3** - **Meets expectations**
- 2** - Falls short of expectations
- 1** - Falls critically short of expectations

Drive Success with Culture & Accountability

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Bottom Line

Tactical, process-driven solutions alone will never make a sustainable difference. **The key to creating change and continuing success is in the culture you build and maintain.**

Communicate clearly to your team so that they know the vision as well as you do. Hire the best people you can find for each discipline, and ensure skills match requirements. Expect as much from them as you do from yourself, and hold everyone accountable. If you've hired correctly, you trust them, and respect them, then you will see your team rise to the level of expectation you present. Everyone will feel the energy generated and will be motivated to continue it – and you will see the results in company productivity & profitability.

Gather your leadership team, and go through these exercises to start *shaping & developing your company vision*, and **create a culture driven by accountability and a passionate focus on delivering results.**