



Setting Goals: follow the SMART formula.

Specific

Measurable

Actionable

Results-oriented

Time-based

Original Goal

Provide excellent customer service.

Identify cross-selling opportunities.

Implement new technology.

Support the sales team's new business efforts.

Expand our small commercial business.

SMART Goal

Provide high quality service to all our customers, measured by an increase of 1% per quarter in our ratings on our customer service surveys.

Work with existing agency customers to sell more services. Identify and close 2 new opportunities per month for a total of 24 new sales to existing customers in 2021.

Lead the implementation of our new commercial lines quoting system, including installation and training in the first half of 2021. Ensure all producers are using the new system by year-end.

Generate at least 10 qualified new business leads each month, for a total of 120 per year.

Develop a strategy to grow our small commercial business achieving a 20% increase in CL revenue by end of 2021.

10 New Ideas for Goal-Setting in Your Agency:

- 1. Engage employees in the process.** It's important to get buy-in and have employees own them.
- 2. Break them into bite-sized pieces.** Looking at the annual goal can be intimidating — and difficult to attain. It helps to break them down and consider what needs to be accomplished on a monthly basis, on a quarterly basis to meet the annual objective?
- 3. Check-in regularly.** Organize regular check-ins with your employees to talk about how it's going, measure progress and make course corrections as needed.
- 4. Connect the dots—literally.** Link individual employee goals to broader business objectives. Employees will be more effective if they can see how their contributions fit into the big picture.
- 5. Take the time to communicate.** Set aside time to sit down with each employee individually to discuss the goals several times a year.
- 6. Write them down and make them visible.** It's important to have a record—for both the manager and the employee.
- 7. Be willing to adapt.** The business changes. Goals shouldn't be stagnant. On the other hand, they're not moving targets, but there needs to be some level of flexibility to shift as markets and business changes.
- 8. Find the balance between too easy and too difficult.** Goals should be stretch goals but they have to be attainable. In assessing the employee's ability to achieve the goals, it can help to talk about 'how' they will do it. In breaking it down, the answers about what results are achievable will become clear.
- 9. Celebrate achievements.** Be sure to acknowledge and reward employees who meet their goals.
- 10. Consider more transparency — including sharing individual goals.** It can be very powerful to make goals visible company-wide. It can help galvanize teams and enables everyone to celebrate successes.



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