Dear Christi,

With the Labor Day holiday upon us, it seemed appropriate to address issues and trends in employment as it relates to our industry. It's no secret that we're facing an impending crisis in the workplace, which is likely to impact each of our agencies to some extent.

What are you doing to attract and prepare your future leadership? PIA of Kentucky is your partner, with information, resources and education to assist you and your entire staff to stay ahead of the trends, as well as our competitors. Just as your employees are your most valuable asset, at PIAK our most valuable asset is you, our member.

Our offices will be closed this Monday, September 4, in observance of the holiday. Have a wonderful Labor Day holiday weekend.

When Disasters Strike

PIA Members There to Help
The PIA Insurance Foundation is raising funds to provide relief grants to Main Street business owners in Texas who were adversely impacted by catastrophic flooding resulting from Hurricane Harvey.

The PIA Disaster Relief Fund, a project of the PIA Insurance Foundation, is soliciting charitable donations and providing relief grants to Main Street businesses that may be facing gaps in the insurance coverages or other assistance available to them. Grants are available in areas of Texas covered by Federal or state declarations of disaster related to the flooding events that resulted from Hurricane Harvey.

"Our hearts go out to the people of Texas who are experiencing what may be the worst flooding in their history," said PIA National Executive Vice President & CEO Mike Becker.

Donate Now

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David Thornton, CIC, Board Member, Past President. David started with Greater Lexington Insurance in the mid 80's as a generalist. He spent the first year targeting homeowners, horse farms, and learning the business. In the second year he transitioned to the commercial side, with an emphasis on residential construction.

Behavioral Insight with The Omnia Profile
Free Member Benefit! Take the guesswork out of hiring.

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Where Are We Going?
In this issue we discuss strategies for building the best possible team for your independent agency. This includes the all-important goal of attracting younger employees to careers in insurance, motivating your entire staff to top performance levels and understanding the HR challenges that face us as small business owners.

Let's begin with some of the trends that are likely to impact us in all of these areas:

Need to attract millennials
We've all heard the dire predictions about our looming workforce gap. According to a report from management consulting firm McKinsey & Co., the average age of a US insurance agent in 59. As such, one-fourth of the industry’s workforce is expected to retire by 2018. And assuming a related MarshBerry study is correct, balancing out the numbers means hiring three young producers for every producer currently employed. With 693,000 insurance professionals age 50 or older - a 74% increase over the past 10 years - the U.S. Bureau of Labor Statistics predicts 400,000 job openings in the insurance industry by 2020.

Even more alarming is the prospect of trying to fill those slots with younger agents and executives at independent agencies when surveys indicate that millennials decidedly favor industries other than insurance. The bottom line, MarshBerry said, is that independent agencies need to start recruiting younger producers immediately.

Technology
Within the span of the next decade, innovators and technologists alike are promising revolutionary advances in today's business technologies that will directly alter the insurance industry: cloud-based infrastructure, next generation artificial intelligence, augmented reality, autonomous vehicles, robotic process automation, real-time analytics, automated claims processing and much more.

Talent will be more important than ever in this new world. In fact, it will be a top priority because the ability to attract, lead and retain the best people will determine who survives. With many strategic choices ahead of them, insurance leaders must ask: "Am I preparing the organization fast enough and in the right way?"

Importance of diversity
We must adapt to these realities by embracing new, different and, yes, diverse ways of looking at how we work and how we create solutions. The diversity of thought in how we reimagine insurance practices, and the willingness of insurance organizations to adapt to new technologies are combining to fundamentally alter how insurance is done.

For insurance organizations, a willingness to adapt to technological advances as well as diverse hiring and business practices simply makes sense. The tech and automation tools are a way to keep pace with others in the industry and ensure the long-term viability and competitiveness of each organization.

Diversity, on the other hand, is where insurance organizations will thrive.

People prefer to do business with those who understand and appreciate their background and where they've come from. Diversity programs, in the traditional sense, allow businesses to provide that level of service. view sources
Meet Your PIAK Board

David Thornton, CIC, Board Member, Past President

David started with Greater Lexington Insurance in the mid 80's as a generalist. He spent the first year targeting homeowners, horse farms, and learning the business. In the second year he transitioned to the commercial side, with an emphasis on residential construction. Work comp, builders risk and bonding are still among David's lead lines. When he began his career, Kentucky was a NCCI State and work comp rates were onerous on Kentucky employers, especially in the trades. So he developed two passions at the same time; politics and being the best insurance advocate and advisor possible for his small business clients.

Through his political efforts David met a lot of PIA leaders and was persuaded to join the board and later elected to the office of President. He had the unique pleasure of holding the first back-to-back two year terms, from 2009-2013 and still sits on the board primarily leading legislative initiatives. All of the principals and producers at Greater Lexington Insurance Agency have attained the CIC designation and all of our CSRs have completed parts or all of their CIC. David considers PIA their go-to education partner. He believes that PIAK is truly the voice of Main Street agents throughout Kentucky.

David can be reached at my office, 859-224-2477 x 224, or by email at dthornton@greaterlexins.com. He welcomes your questions about the PIA, KY politics or getting started in the insurance.

Behavioral Insight with The Omnia Profile

Free Member Benefit!
In just 10 minutes or less, Omnia's behavioral assessment tool gives you insight to take the guesswork out of personnel decisions. Whether you are hiring a new employee, deciding on future roles for current employees, team building or creating a succession plan for your agency, Omnia can help.

As a special PIA member benefit, Omnia Group offers one complimentary assessment for your agency. PIA Members also get one free profile with initial package purchase.

Identify good candidates for specific positions, compare internal candidates for transfer or promotion, and understand the people on your team, and what they need to get and stay engaged.

Omnia Behavioral Assessment Can Help You
- Learn if a CSR will fit with your team
- Compare candidates with top staff
- Answer the question, "Can your producers really sell?"
Uncover management challenges
Maximize your employees potential!

Contact Carletta Clyatt: Carletta@OmniaGroup.com or 800.525.7117 x1226.

Be sure to mention that you're a PIA member or visit the PIA member benefit page.

Free PIA Member Exclusive Webinars
All webinars are eligible for 1 General Human Resources CE credit - a certificate of participation will be emailed to you after the webinar.

Webinars are 2:00pm - 3:00pm ET Click on the webinar title to register.

September 20th
Employee Recruiting Methods to Hire Right the First Time

October 18th
Power Interviewing

November 15th
Onboarding Your New Employee for Success

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Attract Top Talent

Attract: cause to come to a place or participate in a venture by offering something of interest, favorable conditions, or opportunities.

We know that identifying and attracting the right kind of talent is a huge challenge in the insurance industry. The strategies for effective recruitment are a quickly evolving landscape, from offering the right vacation perks to identifying personality traits.

Competitive wages and a good benefits package still top the list of what makes a company attractive to employees, according to Carrier Management's May 17, 2017 issue, reporting on a new survey of financial services professionals commissioned by workforce management technology provider Kronos Incorporated and conducted by Future Workplace. But respondents also want flexible work arrangements and opportunities for career advancement. The majority also say they need to see what a company stands for before joining and look for a company with a strong philanthropic mission.

What are the top independent insurance agencies thoughts on effectively recruiting talented people?

"Agency sales culture is transitioning to accommodate multiple generations in different cultures. New sales staff come from all ages and walks of life", Tom Harrison, SIA of the Great Lakes, Green Bay, Wisconsin.

"Hire for sales ability - not knowledge of insurance, which can be learned. If the skill set for sales is there, learning the insurance piece is doable" Sue Hendrix, Insurance Store, Inc., Chesterfield, Missouri.

"I believe we can attract new workers to our industry by giving them several monetary incentives to bring in their own business, as well as cross-sell other lines of insurance to our existing clients” Vincent Mannino, All Nevada Insurance, Inc., Las Vegas, Nevada.
“I think that we need to do more to expose people to insurance at a much younger age. The industry spends billions of dollars each year on marketing, but nowhere near as much in creating mediums in our educational system” Robert Mazey, New Jersey Agents Alliance LLC, Princeton, New Jersey. view sources

Hiring Gen Y

Millennials + Insurance Careers = Optimism
In spite of what you may have heard, millennials (aka Gen Y) are extremely optimistic about careers in insurance. According to Insurance Journal's 2016 Young Agents Survey, their optimism is higher today than it has been in recent history. "I believe that the insurance industry is a great way to start a career," said a young agent responding to the survey. "You're always learning and a lot of individuals will be retiring. Who will replace those people? Young insurance agents!"

According to a 2016 study from insurance technology provider Vertafore, which polled 4,000 insurance professionals between the ages of 19 and 35, more than 80 percent of respondents say they plan to remain in the insurance industry for as long as possible. What makes insurance a great career for this group? What we, the insurance industry, have to offer is a great fit for the things millennials care about the most, including:

Career Advancement Provides Opportunities to Learn
Millennials can exercise their entrepreneurial attitudes in the insurance industry, especially in jobs that require creative thinking, problem-solving and a desire to help others.

Diversity is Welcome
At 87 million strong, millennials are the largest generational group in America, and also the most diverse. Insurance roles entail communicating and collaborating with people from all different backgrounds, and this experience will prove invaluable as the insurance industry expands to writing policies in emerging markets.

Teamwork is Everywhere
Millennials recognize that working together is more efficient than struggling alone. In the insurance industry, successful collaboration identifies business opportunities and solves problems. In an independent agency, employees work with a range of professionals, inside and out of the company.

Flexible Work Schedule
At the very least, the job is unlikely to entail sitting behind a desk 24/7.

Ability to Shape the Future
The insurance industry is looking at millennials - as true digital natives - to creatively use technology to solve problems and deliver risk solutions.

While those young agents already in the business understand the rewards, the challenge is in communicating these benefits to their peers. So what are some strategies for attracting millennials to your agency?

Always be hiring: a Reagan recruitment study found that almost 60% of agencies are under-hiring - not hiring enough producers to support their growth and perpetuation objectives. And being consistently open to uncovering candidates can lead to a larger pool to choose from.

Try overlooked sources: Rather than the typical, but short-sighted, strategy of stealing from other agencies, look for leads as many places as possible. Build a strong internal pipeline and work through
centers of influence" such as carriers, local trade partners and social media. Build a relationship with your area schools for a source of future hires. And consider other nontraditional sources that specialize in helping veterans in the workplace.

**Tune up the technology:** Advances in technology are happening in our industry, but not fast enough for young agents. "We desperately need technology that will make it 10 times faster to do new business and service tasks on commercial and personal lines in order to even remain relevant," wrote a concerned young agent. "NOBODY is building this for us".

**Make mentoring part of the culture:** Mentors are especially useful for new hires straight out of school, who need one-on-one coaching and someone to "give them a clear picture of what success looks like," Bourke says. The most effective mentors are close in age to the young hires they're mentoring, and must also be accountable for the hire's performance. Best of all, mentoring is a two-way street, as mentors frequently learn a lot from their mentees. [view sources]

**The Right Stuff**

**Sales Talent**
Regardless of age, the type of number one talent we are usually targeting is sales ability. And we hope that our top sales performers can be developed into leadership roles. So identifying the traits that are indicators of future success is one of the most critical steps in the process.

Author John Farrington identifies the biggest trait of a sales winner as having the "Running Towards" personality instead of the "Running Away" personality. The "Running Away" type hits their snooze button three times before rolling out of bed, willing to skip potentially vital activity in order to enjoy a few more minutes of sleep.

In contrast, the running toward mindset has already prepared to start their day the night before. They allow ample time for exercise, enjoying breakfast with their family and being ready to go with time to spare. Life for these people appears effortless and relatively stress-free - because they have made it that way.

Recruiting sales superstars is tough. How do you identify a running toward personality? Look for these key attributes:

**Ownership over results:** As the saying goes, you can make money, or you can make excuses. But you can't make both. The kind of people who can rack up an impressive client list will always focus on what they can do, not what they can't.

**High level of ambition:** Mediocre doesn't cut it.

**Endless willpower:** How have they handled rejection, disappointment and frustration, all inevitable in the sales cycle? Ideally, you want salespeople who can get knocked around all day long and then bounce back like it never happened.

**Focused on goals:** People with a goal-oriented mindset always trump those who limit their focus to mindlessly completing tasks. Why? Because they come up with creative ways to get the job done.

**High level of empathy:** The ideal salesperson should be single-minded about achieving their own personal goals, but also be able to easily connect with and understand the minds of others.
You're looking for someone who is willing and able to take center stage and make a good impression, so they should be at their peak during an interview session. Once you've identified this sales star, instead of asking what they can do for you ask what you can do to support them. Make their success your priority and you'll all be winners.

The Dream Team

Set Up to Succeed
We all agree that identifying great candidates and attracting them to your agency is a lot of work - and for ultimate success, must be an ongoing effort. But that is only the beginning. What we do from there, beginning with the onboarding process, sets the stage for that new employee's entire career with your agency.

Although no independent agency owner ever sets out to undermine their employee's performance, unfortunately that's just what can often happen simply because they don't realize they are doing it. In many cases owners haven't had much formal business training, so they learn from their former managers, and may end up inadvertently repeating mistakes.

Here are some of the most common mistakes that set up employees to fail:

- **Misleading job titles.** We all use job titles to communicate what each member of a firm is supposed to do and how that differs from other employees. However, many firms use pre-existing "industry" job titles that sometimes don't apply to a specific job in their firm. For instance, I frequently see the title of "associate advisor" used for what, in reality, is a client service job. This creates confusion among management, other employees and the employee him- or herself about what job he or she is supposed to be doing. When those expectations don't meet the reality of the job, it can appear that a very good employee isn't doing their job - when, in fact, they are.

- **Pre-existing expectations.** When they hire a new employee, most owners have a pretty clear notion not only of what the job is, but also how it should be done - which is usually based on how they would do it or how a former employee did it. The problem is that no two people have the same mental skill sets or the same approach to problem solving. If they want their employees to succeed at their jobs, owners and managers need to give them leeway to do their job their way, not someone else's way.

- **Projected motives or behaviors.** Most new employees are hired to take the place of a former employee. When that employee had left the firm or was let go under a "cloud" of one kind or another, it's not unusual for the owner to fear the new employee will behave the same way. It's pretty obvious why this is unfair. What's more, starting a new job is stressful enough: When you add a level of undeserved distrust, it can be overwhelming. Owners need to deal with their own baggage and give other employees the benefit of the doubt.

- **Failing to adequately train or to equip.** Without the tools they need to succeed at their jobs, employees are set up to fail. This includes training about how the firm operates as well as what they need to know to succeed at their jobs. These days, it means having the right technology. As a rule of thumb, technology is cheaper than people. And you'll need fewer people if they have the technology to tap into all the resources they need inside and outside of your firm. Today's clients want technology interfaces, and you can meet those demands best when your employees are as tech savvy as your clients.

- **Failing to understand what employees really want.** Many firm owners assume what their employees want, often based on what they themselves want. But people work for many different reasons, which often don't include more money or career advancement. To motivate employees, you have to know what motivates them. Asking them is a start, but to really find out, watch for what makes them happy, what they smile about. Listen to when words match their actions - that's how you know what they really want.

Steps for Onboarding
A full orientation is essential for fully assimilating new employees to your agency-and, ultimately, to their success as a representative of your firm.

1) **Develop a formal plan.** Build a comprehensive, organized onboarding plan and timeline for the new hire. The onboarding plan should:

* Identify all critical knowledge elements the employee must acquire.
* Register all operational elements they must understand and execute.
* Document all critical background and historical contexts they need for efficient and effective performance.

An effectively designed onboarding plan expands the new hire's knowledge beyond their own practice, creating opportunities to not only meet and greet but engage with other individuals from the other practices or service teams. A holistic menu of what the agency offers creates a culture of collaboration from day one-and it can prove beneficial down the road.

2) **Don't curb the enthusiasm.** The traditional orientation process is fine, but it lacks passion, and it fails to give new employees enough opportunity to interact and engage with the content. The best orientations for today's worker offer extensive interaction with a firm's value proposition and strategy, including specifics about competitive advantages in the agency's territory and markets.

Giving a new salesperson an assignment to research and articulate your agency's value proposition is an excellent, self-paced task for not only acquiring the necessary perspectives on operations, but also engaging with multiple internal resources. The process builds relationships across the agency, giving the new hire access to a range of valid perspectives on what drives agency success.

3) **Gauge existing knowledge and skill level.** Next comes a big challenge: accurately understanding the new employee's knowledge, skills and competencies. While professional designations and certifications are decent indicators of previously acquired professional knowledge, how the employee has used and leveraged their knowledge and skills in prior jobs can also be influenced by the environment of their prior agency.

4) **Compare and contrast.** As you compile a summary of the new hire's knowledge and skills through ongoing discussions and interactions over their first weeks, you should also compare that summary with known job requirements. Most should already be codified in job descriptions, but your active engagement with the new hire will likely generate important customized knowledge and skills that will flesh out the original job description. For example, the role may have unique elements related to the type of accounts or territory the new hire will be responsible for.

Ultimately, the two-step process of compiling detailed knowledge and skills, then cross-referencing those elements to exact job needs, will serve both the new hire and manager well. The manager obtains an advanced set of validated expectations, while the new employee receives a detailed breakdown of most critical elements of the job.

5) **Sustain the enthusiasm.** Providing encouragement and observations immediately will set the pattern for future feedback discussions. After that, hiring is an investment that requires attention. Set up time each week to meet with the new recruit—you may have them accompany you to client visits or meetings, but that's no substitute for one-on-one time.

At most agencies, full orientation to a book of business happens over the 12-month renewal cycle. Regardless of account similarities, the full profile of accounts and the multitude of relationships involved with both clients and carriers is not complete until the producer has handled all renewals. And in addition to the account work, the new employee is still building cross-departmental relationships and skillsets during that first year.
Even with solid introductions to all resources and experts at the beginning, a relationship isn’t strong until a new employee regularly works with others to solve issues at hand. Once these relationships actualize, your new hire will achieve significantly higher job productivity—as well as job satisfaction.

With this combination clients get better service, the new salesperson gains confidence and feels appreciated, and the agency team becomes stronger and more effective.

**Empowering The Team**

For a group of people to remain consciously competent, performing at optimum levels, they require frequent injections of stimulation, motivational guidance, coaching, prompting and directing; otherwise, they can easily lapse into becoming unconsciously competent or worse, unconsciously incompetent.

Successful insurance agencies believe in their people, encourage them to achieve excellence and they release them to do it.

Just as important as each team member’s skill sets, emphasis must also be placed on building a team that is culturally diverse, inclusive and with multilingual individuals. Imagine your dream team: a diverse group of people with different skills and abilities all working together to achieve the same goals.

Keep in mind that people want to be recognized, appreciated and rewarded. Look for ways to add fun and profit to your plan to meet and exceed goals. Having fun means getting everyone engaged in the agency’s success through goal-setting and teamwork. Set different levels of goals: company, team and individual, and establish appropriate awards for each. This helps build a high level of esprit de corps, ensuring that each team member feels appreciated and rewarded for their contributions to the overall success.

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**Leaderboards, Points and Prizes**

Agency Performance Drivers

The gamification movement within the insurance industry is already proving to be a powerful tool for insurers to adopt customer-centric business models. Game mechanics such as leaderboards, points and prizes can drive more meaningful levels of engagement among agents, transforming otherwise onerous tasks into interesting and fun experiences while delivering educational material along the way. Gamification, which taps into users’ sense of competition and achievement, applies game mechanics and game design techniques to spur engagement.

**Key Elements:**

- Keep it simple. If there are too many layers and hoops to jump through, participation numbers drop.
- Ensure a valuable user experience. The key is to test the user interface prior to launch. This is a top priority, especially for a campaign that hinges on an interactive platform.
- Provide educational entertainment. Agents are choosing to participate, so it’s important to translate educational content into entertainment to keep them engaged.

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*view sources*

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Featured Class

Note: Hotel block rate cut-off September 1!

Explore Your Areas of Interest

Register

JK Ruble Graduate Seminar
Category: CIC Institute
September 19-20

Location: Louisville Marriott East
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  * D&O: A Dozen Dangerous Details-Identifying Risk

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Upcoming CISR Classes

Insuring Commercial Property
September 13, 2017 ~ Lexington
CISR Elite ~ Ready for the Next Step?

CISR Elite is the most advanced distinction for insurance professionals, demonstrating that you are driven by excellence and knowledge. To gain the status of CISR Elite all nine CISR courses must be completed. You already keep your education up-to-date. Why not earn a new distinction in the process?

Upcoming CIC Classes

Agency Management Institute
October 11-13 2017 ~ Louisville

Commercial Property
December 6-8 2017~ Lexington

Upcoming CPIA Classes

CPIA 2: Implement for Success
September 13, 2017 ~ Frankfort

CPIA 3: Sustain Success
October 25, 2017~ Frankfort

Live Webinars

Additional Insureds: The Quandary
Hurricane Harvey is the most powerful hurricane to strike Texas in more than 50 years. Insurance adjusters and their mobile claim centers have already been deployed and are heading toward the areas of the Texas coastline receiving the brunt of damage. As soon as local authorities clear the damaged areas for access, insurance company representatives will be on the scene and will start the recovery process for impacted policyholders.... more

Hurricane Harvey Fuels NFIP Debate The National Flood Insurance Program (NFIP) is being grimly highlighted as the remnants of Hurricane Harvey stubbornly continue to inundate Texas. The flooding catastrophe in Texas struck just as Congress is approaching a Sept. 30 deadline to reauthorize the National Flood Insurance Program (NFIP), with lawmakers divided... more

FEMA Chief: Cut Coverage for Flood-prone Homes Federal Emergency Management Agency (FEMA) Administrator Brock Long is pushing for an overhaul of disaster relief so that states, cities, and homeowners shoulder more of the costs and the federal government bears less of the risk.....more

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Sources for articles in this issue

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Employment Trends in the Insurance Industry

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