

Sample Goals & Objectives

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Producer Lead

- Maintain a minimum score of XX% on both corporate and internal professional standards audits for all assigned accounts in 2010
- Develop, present and obtain approval for a business plan to achieve the established production goal of \$XXX,XXX and a XX% renewal retention rate for existing accounts
- Manage business expenses to no more than X.X% of book of business, reducing overall expense by \$XX,XXX annually
- Adhere to the corporate travel and living policy with no exceptions
- Increase the number of prospects that move to the RFP stage by XX%. This will be accomplished by utilizing documented and proven sales management strategies for all initial prospect meetings.

Producer

- Increase book of business revenue by X%
- Exceed production goal by X% by <<insert actions>>
- Achieve a minimum renewal rate of XX.X%
- Deliver a minimum of XX qualified cross-business or cross-border referrals
- Contact XX new prospects each month to generate additional business to meet production goal
- Present complete submissions to carriers 30 days before date required at least XX% of the time
- Improve close rate by XX%
- Improve client retention rate X% by <<insert actions>>

Account Manager

- Improve year-over-year customer retention rate by X% (measured as of 12/31)
- Develop and submit detailed account management plans for top five accounts; Successfully execute manager-approved plans by end of year
- Ensure that 100% of processes are followed and timelines met according to Gallagher's Professional Standards
- Proactively solicit at least 1 referral lead each quarter that will be handed off to Production staff
- Attend at least 1 client meeting with Producer by the end of the year

Claims Representative

- Complete 100% of client claim reviews adhering to clients' special claim handling guidelines/performance guarantees with 0 defects
- Remain 100% current on my diary/work queue on a monthly basis
- Score a minimum of XX% on each formal company audit
- Strive to return all clients' messages the same day, but no later than 24 hours if same day is not possible
- Document 100% of reserve changes in notebook

Account Representative or Customer Service Representative

- Bind new and renewal coverage with underwriters prior to the effective date, with at least XX% compliance, as measured through the SOX Renewal List
- Complete policy checklists within XX days of receipt of the policy, as measured through the WIP report
- Initiate renewal review process no later than XX days prior to the effective date utilizing the expiration list for you accounts, as measured through the WIP report
- Achieve an average PS Compliance score of at least XX% within the review period
- Achieve 100% AVC disclosure compliance within the review period
- Resolve open suspense so as not to exceed X months over XX% above the branch CSR average, as measured through the suspense report.
- Process endorsements within XX working days of receipt, with at least XX% compliance, as measured through the WIP report.

Administrative Assistant

- Develop department calendar and phone listing to be viewed on the portal. Assist the department in effective scheduling through this centralized view and help the team to prioritize and complete requirements on time.
- Develop standard operating procedure that adheres to all Concur expense policies, to post and clear all travel expenses within 2 weeks from travel date. Plan to follow up on all required receipts within 3 days of travel.
- Participate in Cognos training to support team in the annual budget planning process.
- Complete Advanced PowerPoint class on eLearn to enhance Microsoft Office Skills. Utilize new skills to enhance presentations for new prospects that will help sales and marketing technicians to be more effective in their presentations.
- Facilitate semi-annual “lunch and learns” to share best practices with sales and marketing technical assistants on a variety of Microsoft products (Excel, Word, PowerPoint) and provide “tips and tricks” through real time presentation of tool and reference guides.

Receptionist

- Complete Advanced Excel class on eLearn to enhance Microsoft Office Skills. Utilize new skills to manage monthly spend of office supplies.
- Complete basic insurance class to build business acumen
- Shadow Customer Service Representative and learn about the renewal process by processing forms, invoicing, creating auto ID cards, certificates and evidence of property forms
- Learn how to renew policies on the <<insert name>> system, enabling me to become a potential back up for Customer Service Representative role
- Study for and pass the state Property/Casualty exam
- Research and establish relationships with local restaurants for discounts on food orders for office events
- Create and publish a listing of preferred vendors that lists discount and delivery information.