**HOW WE THINK:**

What are the top three things the leaders/owners of the company VALUE (most important… as proven by actions)?

Why are we in business?

What do we do?

**LEADERSHIP:**

How clear are the expectations for employees? Explain:

How are people evaluated for performance in the current culture?

How do we hold people accountable? On a scale of 1-10 (1 = not at all, 10 = extreme) how much does the organization hold people accountable?

How does the organization motivate people?

What style of leadership exists today? Circle items that are part of the current culture: Empowerment, control, hands on, hands off, active, passive, introverted, extroverted?

What are the reporting structures and what levels of authority exist with different positions?

**STRATEGY:**

What are the current business strategies being used to get results today?

What strategies do we believe will be necessary to be successful in the future?

**CLIENTS:**

What are the philosophies the company believes in pertaining to the clients?

What are personnel structures used to manage client relationships, service, and value delivery?

What is the Producer/Consultant’s role in working with clients?

Are clients served with a pool of Account Managers or are clients assigned to Producer teams that stay consistent?

**MARKETING (external to prospects and clients):**

How does the company communicate with Prospects and Clients?

What social media is being used today? List any social media policies.

What are expectations of any personnel pertaining to marketing?

**MARKETING: (Internal to insurance companies):**

Who does the marketing in each line of business?

Does the organization do the marketing on the Producer team or is it pooled and/or done with a marketing department?

**OPERATIONS:**

What is the structure of leadership and management in operations?

How were the process and procedures developed?

How disciplined is the organization to the current processes/procedures?

How receptive will the people be to changing the processes and procedures?

**AUTOMATION:**

What automation system is currently being used?

What level of usage is the organization experiencing today (1-10, 1=Not utilized at all; 10=Maximizing the system).

What accountability is in place for the use of automation today?

**PRODUCERS / SALES:**

What is expected of a Producer?

What is the expense management process in place with Producers today?

What style of management is used with sales people in the organization today?

**NORMAL BEHAVIORS:**

What behaviors, both positive and negative, would be normal in the company today that have not been listed in the above answers?

SUMMARY

What items are the same?

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What items are different?

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What items will be most difficult to change? Why?

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| ITEM | WHY? |
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Are any items potential deal killers?

How much do we expect to spend in blending the “cultural” part of the business?

Action Items from this Assessment: