Input Agency Employee Data

In this section, you will be asked to provide some input on all employees of your agency.

For every employee, you will be asked to provide:

1. An identifier, such as an employee ID, initials or first name (please DO NOT use the employee's full name).
2. A role description for each employee, where everyone is assigned to one of these 12 role descriptions.
3. The ZIP code for the primary office where the employee works (or the ZIP code for his/her home office, if this employee works from home).
4. Whether this employee is full-time or part time.
5. Whether this employee is a full-time employee (W-2) or a contractor (1099).
6. Number of years of insurance industry experience.
7. Number of years working for this agency.
8. The size of the book managed/serviced by employee.
9. Whether the person is paid A. Hourly, B. Salary, C. Salary + Commissions or D. Commissions Only.
10. Information about this person's hourly wage (if employee is paid hourly).
11. Information about this person's annual salary (if the employee is paid a salary).
12. Information about this person's commission payments for last year (if this person is eligible for commissions).
13. Whether this person is eligible for any bonus or profit-sharing program.
14. What the performance bonus is based upon (individual performance, corporate performance, business unit performance of some combination of these factors).
15. How much this person earned in bonus and/or profit-sharing last year.
16. Whether this person has any insurance designations or credentials, such as AILP, ARM, CIC, CISR, CPCU, CPIA, CRIS, CRM, MLIS, or another designation.

Please have this information ready for all employees in your agency.

Employee Role Types:

1. **Owner/Principal** - A person who owns and directs the strategic vision, daily operations, and growth of an insurance agency, ensures client and carrier relationships drive growth and profitability.

2. **Vice President/Executive** - Provides leadership and strategic direction for the agency. Oversees operations, growth initiatives, and key client and carrier relationships. Responsible for high-level decision-making, financial performance, and ensuring alignment with business objectives.

3. **Producer** - Generates new business and maintains client relationships. Identifies prospects, assesses coverage needs, and presents insurance solutions. Works with service teams to manage accounts and ensure client retention.

4. **Account Executive** - Titles can vary by agency, but this role is a senior service professional responsible for the largest and most complex accounts. They manage all aspects of the client relationship and can conduct on-site visits without a producer present.
5. **Account Manager/CSR** - This role supports clients and producers by handling policy servicing, answering inquiries, processing changes, and assisting with renewals. They manage day-to-day administrative tasks, provide coverage information, and help maintain client relationships.
6. **Processor/Tech** - This is a general processing role. This position typically handles more administrative functions on the service team.
7. **Accounting/Finance** - Handles financial operations, including billing, commissions, payroll, and reporting. Manages accounts receivable/payable, reconciles financial statements, and ensures compliance with industry and regulatory standards.
8. **HR** - Manages the agency's employee lifecycle, including recruitment, onboarding, benefits administration, training and compliance with employment laws. Supports leadership in cultivating a positive workplace culture, addressing employee relations, and developing policies.
9. **Operations** - Oversees agency workflows, efficiency, and resource management. Implements policies, optimizes processes, and ensures smooth day-to-day operations. Works across departments to improve productivity and support agency growth.
10. **Marketing** - Develops and implements marketing strategies to promote the agency's services. Manages advertising, branding, and public relations efforts. Analyzes market trends and client needs to identify opportunities for growth.
11. **Admin/Receptionist** - Serves as the first point of contact for clients and visitors. Handles incoming calls, schedules appointments, and assists with administrative tasks. Supports office operations with organization and communication.
12. **IT** - Manages the agency's technology systems, including software, security, and troubleshooting. Supports staff with technical issues, maintains system performance, and ensures data protection and compliance.