# Today's Agenda

- Overview Independent Insurance Marketplace's Human Resource Environment

- 4-5 breakout discussion in your established groups to discuss how you are approaching recruitment, retention, and the ongoing evolution of your team's makeup.

- Wrap-up and takeaways

This session is built for YOU to learn from each other, so get ready to share your ideas, thoughts, and experiences!

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Where Are We Headed?

- Aging Demographic

- Shortage and movement of experienced talent

- Generational differences & expectations

- Absence of career path in small agencies

- Surge of Technology, Automation & AI
  and the expected impact on workload and capacity

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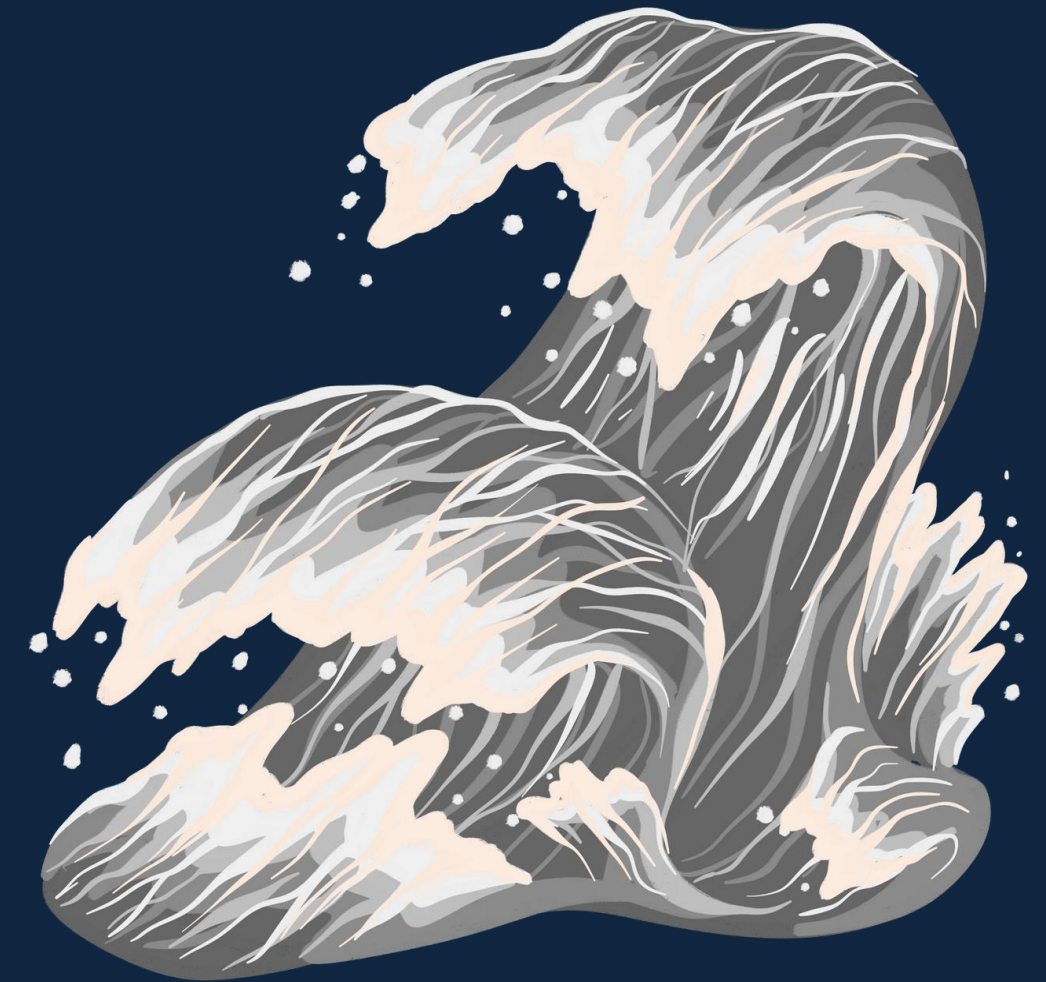
Current Challenges

2024 Agency Universe Study

56% Finding carriers who will maintain commitment to your market

People Related Challenges

46% Finding and screening candidates with strong potential
33% Retaining staff (non-producers)
30% Retaining experienced producers

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Workforce Changes

- **67%** of agencies are looking to expand headcount

- Producer roles expected to grow by **6-7%** over next 5 years

- Account Managers/CSRs - mixed stability with technology and digital tools increasing efficiency expectations – will reduce overall number of roles.

- **40%** of Owners will be seeking succession and ownership transition within 5-10 years

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Current Makeup of Workforce
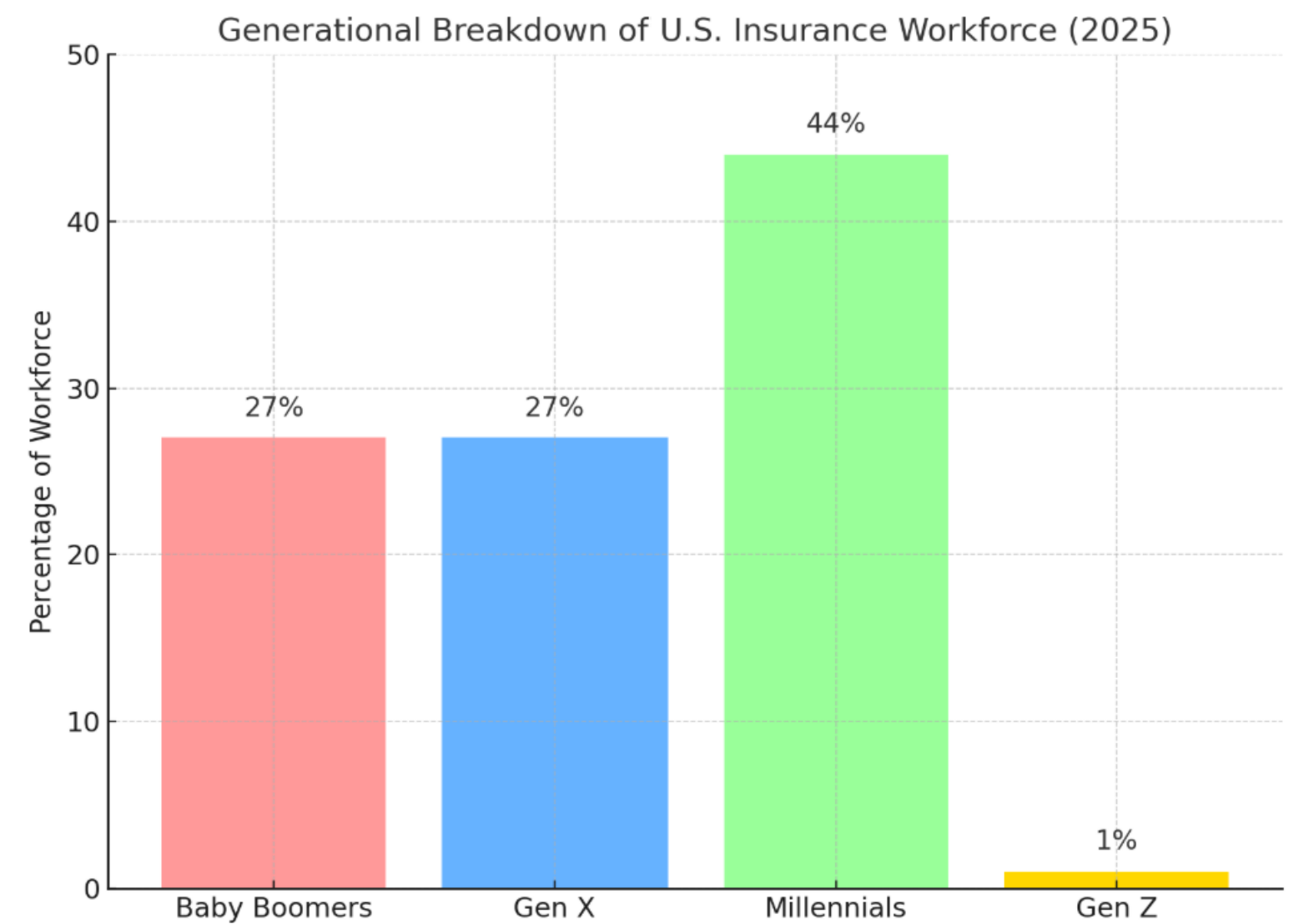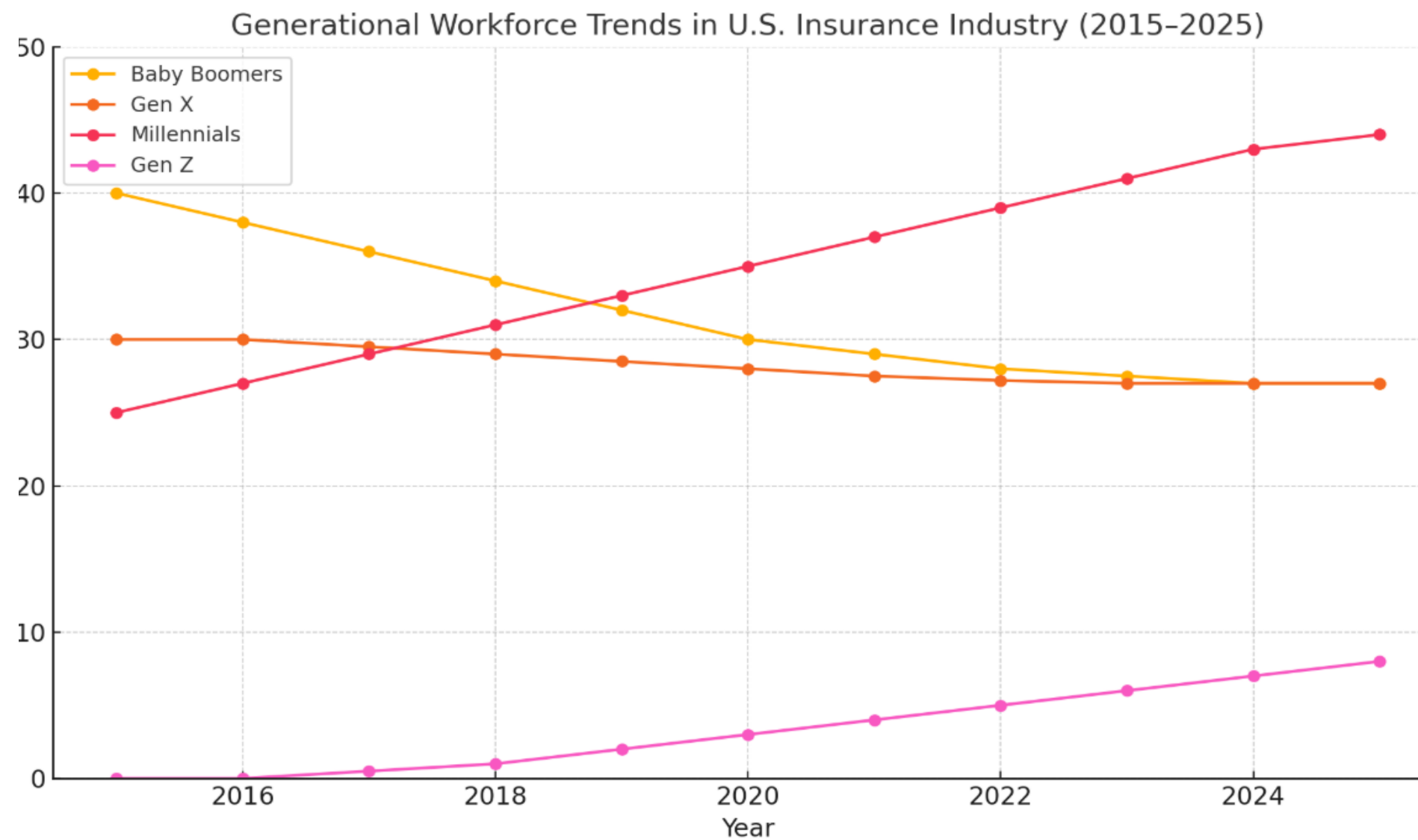
Current Makeup of Workforce

Role	Boomers	Gen X	Millennials	Gen Z
Executive Leadership	85%	10%	5%	0%
Agency Principals	70%	25%	5%	0%
Mid-Level Management	25%	50%	20%	5%
Producers	25%	55%	18%	2%
Account Managers / CSRs	10%	15%	65%	10%
Marketing & Digital Innovation	2%	5%	60%	33%
Data & Automation Analysts	1%	4%	60%	35%
Claims / Underwriting Support	1%	4%	60%	35%
Interns / Entry-Level Roles	0%	0%	25%	75%

Breakout #1

Finding the Right People

- What role are you currently hiring for?
- What role has been hardest to hire?
- Are you currently recruiting for any non-traditional roles?
- Where are you finding your best people?
- Do you use any outsourced recruiting or HR providers?
- What job postings or ads have resonated?
- How are you assessing culture fit?

What assessment tools do you use?

Hiring Assessment Tools Comparison Chart for Insurance Agencies

Tool	Type	Best For	Highlights
Criteria (CCAT)	Cognitive	Producers, CSRs	Logic, math, attention to detail
Wonderlic	Cognitive	CSRs, Entry-level	12-min quick test, widely used
DISC (TTI/PeopleKeys)	Personality	All Roles	Behavioral fit and communication
Caliper Profile	Personality + Sales	Producers, Leadership	Sales DNA, performance prediction
Predictive Index	Behavioral + Cognitive	All Roles	Fast, integrated into ATS
Culture Index	Behavioral	Producers, Execs	Deep culture fit insights
SalesGenomix	Sales Aptitude	Producers	Benchmarked against top salespeople
TalentSort (Omnia)	Sales/Service Match	Producers, CSRs	Quick fit scoring
OMG Sales Assessment	Sales-Specific	Producers	Sales pipeline & motivation scoring
eSkill	Skills Testing	CSRs, Admins	Custom tests, software & service
TestGorilla	General Testing	All Roles	Wide test library, integrates with ATS
Vervoe	Skills + AI Grading	All Roles	Automated grading, customizable
HireVue	Video Interview	Producers, CSRs	AI-analyzed video answers
Spark Hire	Video Interview	Entry-level, Remote	One-way video interviews
myInterview	Video Interview	Remote, Culture-Fit	User-friendly branded video tool

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What is your best interview question or screening strategy?

Common Hiring Challenges

- Vague or Misleading Job Descriptions
- Poorly Defined Hiring Criteria
- Slow or Inconsistent Hiring Process
- Overreliance on Resumes vs. Practical Evaluation
- Cultural Misfit
- Unorganized onboarding process & ongoing training

- **Owners 'go it alone' or 'do it themselves' with no training in this area.**

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Onboarding Outline

Timeframe	Objective	Activities
Pre-Day 1	Be prepared to hit the ground running	Complete HR paperwork, tech setup, welcome email from manager
Day 1–7	Integrate into culture and systems	Introductions, tools overview, agency mission/values training
Day 8–30	Begin role-specific training	Shadowing, platform training, early tasks
Day 31–60	Perform with guidance	Independent tasks with feedback, participate in meetings
Day 61–90	Full-role ownership	Measured KPIs, productivity goals, performance review

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Onboarding & Training That Sticks

- Share what your first 30-60-90 day plan looks like for new employees?
- Who owns the onboarding process in your agency?
- What tools/systems do you use for onboarding/training?
- What's one thing you've done that made training new hires more effective?

Quiet Quitting

59%
of the Workforce

Boosting engagement – improve recognition, career paths, manager training
Providing Mental Health Support – Targeted wellness programs
Balancing Workloads – Address burnout and ensure reasonable expectations instead of silent disengagement

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Retaining and Developing Talent

- Do you utilize any employee engagement software?
- Are career paths defined for each role inside the agency?
  - Share what those paths look like.
  - What does ongoing training look like inside the agency beyond onboarding to support these career paths?
- What are some of the non-monetary benefits that you provide to your staff?
- What culture-building efforts are working for you?

Remote Work & Flexibility

Agency Universe Study: Currently 54% of agencies report having no remote employees compared to 55% in 2022.

Have Remote Employees 46%

No Remote Employees 54%

2022 45%

2022 55%

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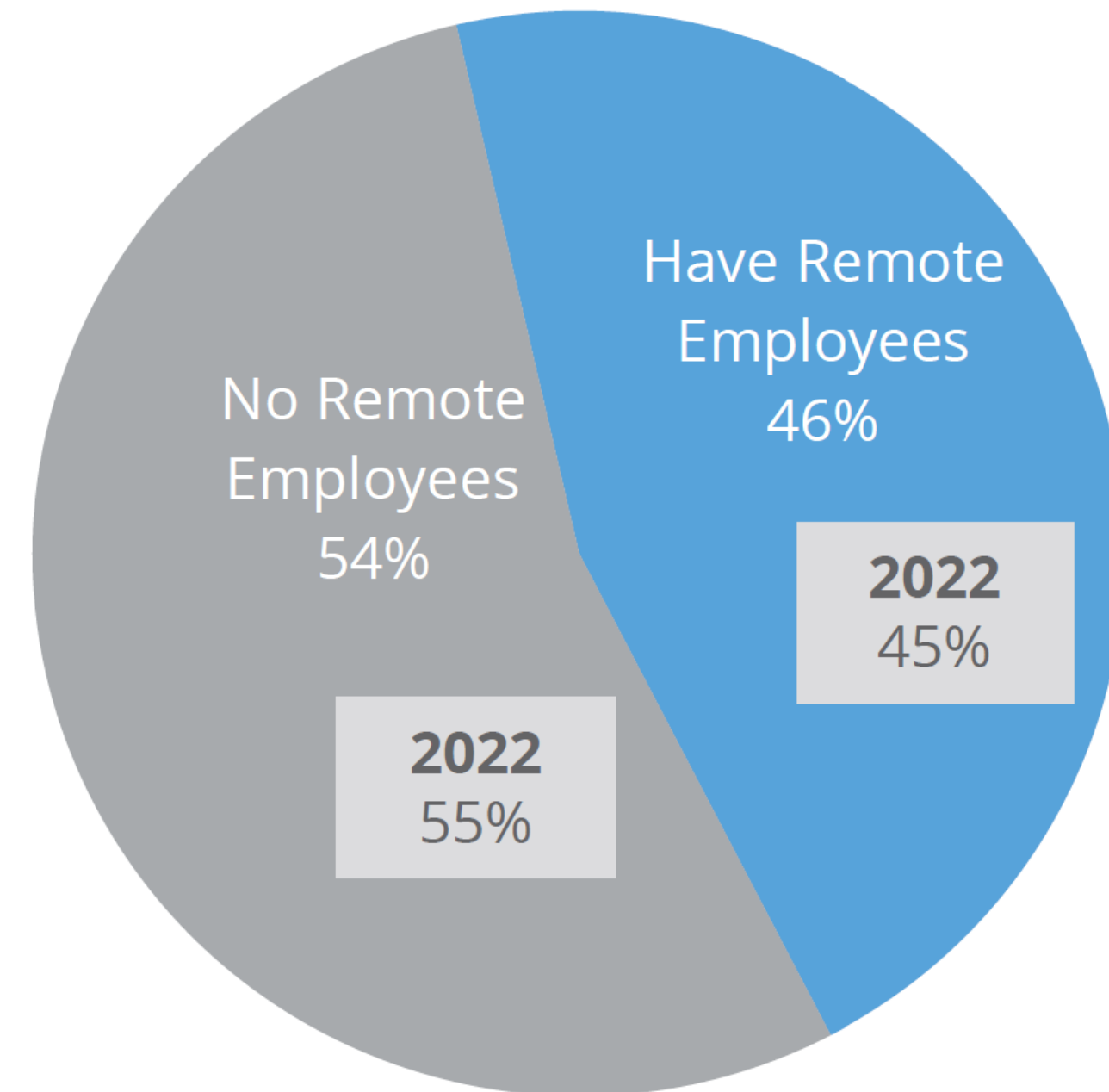
Breakout #4

Remote, Hybrid & an In-Person Culture

- How has your ability to recruit changed since allowing remote/hybrid roles?
- Do you have a remote work policy in place?
- What are some ways you keep your remote and hybrid employees engaged?
- Have you changed your policy on remote work over the past 5 years?
- How has the performance of your agency changed after embracing or eliminating remote/hybrid roles?

Expectations for Capacity & Efficiency

Capacity Metric	Personal Lines	Commercial Lines	Benefits
Revenue Per CSR	$143K-246K	$200K-338K	$268K-$480K

Revenue Per Employee
$175K - $298K

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Redesigning Roles with Automation, Technology and/or AI

- Are you hiring for any new types of roles inside the agency as a result of the evolution in technology, AI, and/or automation?

- What tools have you recently added that significantly reduced or changed workload?

- What changes have you made to your traditional roles as a result of automation, technology or AI?

- What tasks have you tried but struggled to assign to a VA or automate?

Group Debrief

What Stood Out?

This is time to share large takeaways & anything that stood out to you in your breakout groups!

Is there anything you plan to look into or implement as a result of this discussion?