

Strategic Project Implementation Tool



Strategic Project	Total Account Development System	Start Date	11/1
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Current Situation	Desired Outcome	Which Critical Indicator?	How Did I?
<ul style="list-style-type: none"> - No formal plan in place - 66% I policy in PL - 49% I policy in CL - Overall Rev/Rel = \$418 	<ul style="list-style-type: none"> - Formal plan/system - Accountability in place - Full time clients only - All clients have annual reviews - >90% with 3+ policies 	<p>Rev/Rel, Retention, Profit</p> <p>How affected?</p> <ul style="list-style-type: none"> - Rev/Rel will increase 50%+ - Retention will increase by 5%+ - Operating Profit improve by 10%+ 	<p>How Did I?</p> <ul style="list-style-type: none"> - Buy in by team - Knew our numbers - Develop annual review process - Ongoing training - Accountability process - Financial incentives
Why Haven't I?	Why Should I?	How Did I?	How Did I?
<ul style="list-style-type: none"> - Always a good idea - No buy in - No system - No training - No accountability - No incentives 	<ul style="list-style-type: none"> - Clients for life - Reduce E&O claims - Improve the CI's - Annual reviews are "owed" 	<p>How Did I?</p> <ul style="list-style-type: none"> - Buy in by team - Knew our numbers - Develop annual review process - Ongoing training - Accountability process - Financial incentives 	<p>How Did I?</p> <ul style="list-style-type: none"> - Buy in by team - Knew our numbers - Develop annual review process - Ongoing training - Accountability process - Financial incentives

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Management Action Plans					
Item	Who	Priority	Start Date	Stop Date	Comments
Determine account dev. state					
Hold team buy-in meeting					
Develop annual review processes					
Develop training plan					
Schedule & hold training sessions					
Develop accountability process					
Establish individual goals					
Create financial incentives					
Develop visible progress program					
Ongoing reinforcement					