

Building a Culture of Tiggers

In a World of Eeyores




(Cultivating positivity and high performance in workplace relationships)




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Traits

- **Optimistic/Positivity (RESILIENCY)**
 - DOGBERT, CAREER COUNSELOR: YOU HAVE NO MARKETABLE TALENT.
 - YOU'RE TOTALLY UNEMPLOYABLE AND THAT'S NOT GOING TO CHANGE.
 - THE IMPORTANT THING IS TO KEEP A POSITIVE ATTITUDE.
- **Enthusiastic**
 - Higher engagement, more initiative, outside of the box creativity, it's contagious!
- **High Energy**
 - Increased productivity, higher morale, better customer service, less turnover!
- **Individuality in a Group Setting**
 - Leverages unique strengths & perspectives, diverse backgrounds, improved decisions
 - **Doer**

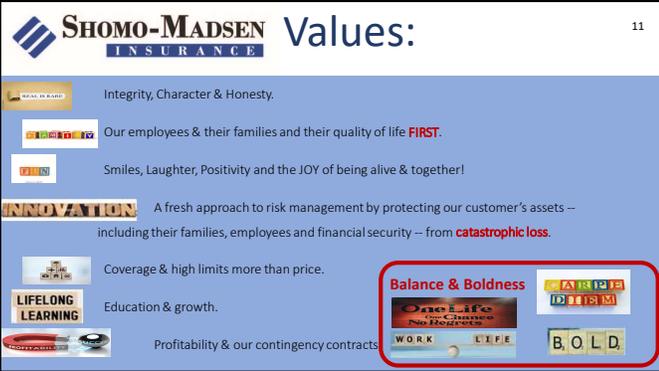
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Traits

- **Pessimistic/Negativity**
 - DOGBERT, CAREER COUNSELOR: YOU HAVE NO MARKETABLE TALENT.
 - YOU'RE TOTALLY UNEMPLOYABLE AND THAT'S NOT GOING TO CHANGE.
 - THE IMPORTANT THING IS TO KEEP A POSITIVE ATTITUDE.
- **Hard to please**
- **Low Energy**
- **Loner/Contemplative/Planner**
- **Hard to please**

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SHOMO-MADSEN INSURANCE Values:

- INTEGRITY** Integrity, Character & Honesty.
- INTEGRITY** Our employees & their families and their quality of life **FIRST**.
- SMILES** Smiles, Laughter, Positivity and the JOY of being alive & together!
- INNOVATION** A fresh approach to risk management by protecting our customer's assets -- including their families, employees and financial security -- from **catastrophic loss**.
- COVERAGE** Coverage & high limits more than price.
- LIFELONG LEARNING** Education & growth.
- PROFITABILITY** Profitability & our contingency contracts.
- Balance & Boldness**
 - Work Life Balance
 - B.O.L.D.

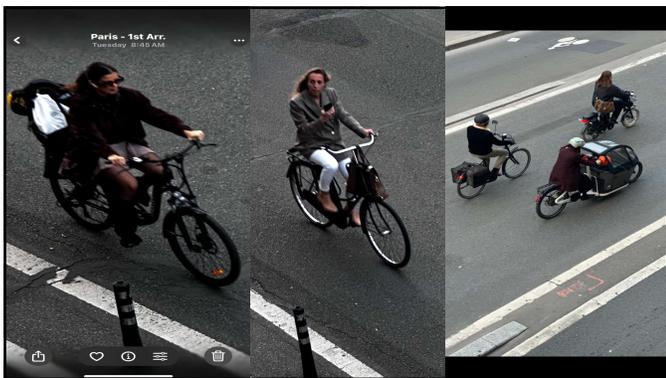
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Seeking the “Soft” Skills

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Hiring managers must look beyond a candidate’s résumé to identify “soft skills.”

- Ask **Behavioral** questions designed to solicit information about how a candidate handles stress, interruptions, receives criticism and manages a differing opinion
- Assess **problem-solving** skills
- Elevate **positivity & Enthusiasm**



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Seeking the "Soft" Skills

Hiring managers must look beyond a candidate's résumé to identify "soft skills."

- **Effective** communication
 - **Active Listener?**
 - **Positive Articulator?**
 - Ability to communicate **tough truths** well?

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Seeking the "Soft" Skills

- **What is the candidate's preset relationship culture?**
- **Assess** a candidate's **sandbox** skills
- Does the candidate have the ability to **positively** contribute in a TEAM environment?
- Is the candidate capable of **failing?**
 - How do they handle failure?
 - Are they capable of learning from their mistakes and adapt?
 - Are they capable of working in a changing environment?

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Seeking the "Soft" Skills

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- **Assess** **problem-solving** skills
- **Elevate** **positivity & Enthusiasm**

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Cultivate a positive work culture

- **Work/Life Balance**
- Treat your team members as family and friends
- Show kindness & compassion
- Inspire your team members to be difference makers
- Celebrate wins and achievements
- Make failure fun
- Make communication open
- Value education, growth & **INTERNAL** promotions
- Promote a culture of trust, respect, gratitude and integrity



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Navigating Difficult Client Relationships

- Know your client's **preferred method** of communication
- Gather the facts
 - Listen for **understanding**.
 - Keep an open mind in the fact gathering stage
 - Don't get defensive (yet!)
- Once you've gathered all the facts:
 - Restate the problem in the client's preferred method of communication
 - If there is an elephant in the room, acknowledge it!
 - Empathize & apologize when appropriate
 - Honesty first with a professional courtesy



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Navigating Difficult Client Relationships

- De-escalate emotions by
 - NOT making it personal
 - NOT accepting an invitation to fight
 - Treating others the way you would like to be treated
 - Even when the client does not give you the same courtesies!
- Set clear expectations by shooting straight
 - I can make a change and I will
 - I can ..., but I'm not going to change
 - I cannot do what you wish me to do
 - I will not do what you are asking me to do



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Navigating Difficult Client Relationships

- It's OK to FIRE a client
 - If profit = success, I am often better off terminating
 - A **monoline** customer
 - A **high-touch** client
 - **Abusive** language/attitude to our team
 - **Mis-aligned values** to that of the agency
 - Someone who **doesn't fit** our business model



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Building a high-performance TEAM

- Know **Who** You ARE and **WHAT** you **VALUE**
 - Hire toward those values
- Know your individual team members as **people**
 - Families, bills, debts, relationship struggles, health issues, ...
- Boomers/Xers typically build from a Top-Down approach
- Millennials/Zoomers value a more **collaborative** approach with **transparency** in dealing with:
 - The complexity of problem-solving
 - The speed of change
 - Leaders often set a vision, but it's the employees that often bring it to life!



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Building a high-performance TEAM

- Know and **communicate** what you are building
 - Motivate to a standard of excellence with an attitude toward constant improvement and valuing education as an investment!
- Efficiencies and increased productivity
- Customer and team engagement
- Commitment to quality
- Synergy through valuing diversity



Good, better, best.
Never let it rest.
'Til your good is better
and your better is best.

— St. Jerome

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(IMAGINATION & CREATIVITY)

- Building and sustaining **healthy** work environments, and
- Providing **unique perks, benefits, and professional development.**

Promote from Within
 PTO for kid's events
 7 hour work day
 Varidesks
 Casual Fridays
 STD/LTD Paid



Parties
 bonuses
 100% paid education/travel
 No hourly employees
 2-4 monitors

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Employee Development

The only thing worse than training your employees and *having them leave* is not training them and **HAVING THEM STAY.**

— Henry Ford, Founder Ford Motor Company

An organization's ability to learn, and translate that learning into action rapidly is the ultimate competitive advantage. — Jack Welch, former General Electric CEO

Where my *reason, imagination or interest* were not engaged, I would not or could not learn.

— St. Basil the Great

The way your employees feel is the way your customers will feel. And if your employees don't feel valued, neither will your customers. — Sybil F. Stershic, marketing and organizational advisor

Learning can emerge as spontaneous order at the edge of chaos. — Sugata Mitra, Professor of Educational Technology, Newcastle

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Calvin Coolidge
& Educated Derelicts...

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“Nothing in this world can take the place of persistence. Talent will not; nothing is more common than unsuccessful men with talent. Genius will not; unrewarded genius is almost a proverb. Education will not; **the world is full of educated derelicts.** Persistence and determination alone are omnipotent. The slogan Press On! has solved and always will solve the problems of the human race.”

Coolidge, Calvin. Citing source: [http://www.goodreads.com/quotes/2749-nothing-in-this-world-can-take-the-place-of-persistence]

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• **Benefits of a Healthy Culture**

- Increased productivity
- Decreased employee turnover
- Increased client retention

“Culture eats strategy for breakfast.”
- Peter Drucker (2006)



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Total CSR

<p>Personality Profile</p> <p>Completed: 3/14/2023</p> <table border="1"> <tr> <th>Support</th> <th>Sales</th> <th>Manager</th> </tr> <tr> <td>34%</td> <td>91%</td> <td>87%</td> </tr> <tr> <td>Not a Match</td> <td>Strong Match</td> <td>Strong Match</td> </tr> </table> <p>↓ EPP Report</p>	Support	Sales	Manager	34%	91%	87%	Not a Match	Strong Match	Strong Match	<p>Criteria Cognitive Aptitude</p> <p>Completed: 3/14/2023</p> <table border="1"> <tr> <th>Support</th> <th>Sales</th> <th>Manager</th> </tr> <tr> <td>42</td> <td>42</td> <td>42</td> </tr> <tr> <td>Overqualified</td> <td>Overqualified</td> <td>Overqualified</td> </tr> </table> <p>↓ CGAT Report</p>	Support	Sales	Manager	42	42	42	Overqualified	Overqualified	Overqualified
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42	42	42																	
Overqualified	Overqualified	Overqualified																	
<p>Computer Literacy & Internet Knowledge</p> <p>Completed: 3/14/2023</p> <p>Highly Proficient</p> <p>19</p> <p>↓ CLK Report</p>	<p>Emotional Intelligence</p> <p>Completed: 3/14/2023</p> <p>Average</p> <p>47</p> <p>47th Percentile</p> <p>↓ Emot Report</p>																		

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•Goals

- Goals are the concrete aims of an organization.
- Well-defined goals are SMART goals.



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Position: Commercial Customer Service Representative (CSCR)
 Reports to: Bobby Stone
 Minimum Salary: \$20,000 to \$22,000

Summary: [Redacted]

Responsibilities:

1. Gather and organize all information for applications and risk management for new business applications.
2. Gather and organize all information and risk management recommendations for renewal of designated accounts 30 days prior to renewal.
3. Present and provide to producer all renewals with prior year comparisons, recommendations, and changes 30 days prior to renewal.
4. Provide customer service to designated accounts and writing agent including, but not limited to, binders, certificates, bid books, endorsements and quotes.
5. Maintain an efficient work process with timeliness, accuracy and completeness.
6. Maintain confidentiality and professionalism at all times.
7. Re-quote and re-rate accounts as determined or approved by producer.
8. Handle producer or any constituent's written inquiries.
9. Collect and deposit Agency Bill premiums.
10. Complete Performance Based units 60 days or sooner from client.
11. Document all material conversations with clients, carriers and staff with AWC 360 through Activities and Suspense.
12. Prepare Monthly and 90 reports to submit to the CIP of each month.
13. Perform other functions as determined and assigned by management.

Knowledge, Skills, Abilities & Licenses:

1. Meet hire and maintain all license required by the State Department of Insurance to discuss and/or sell insurance in states where agency functions.
2. Should be working toward a CE or CEU designation or will consider designation alternatives.
3. Requires both verbal and written communication skills.
4. Requires satisfactory working knowledge of Microsoft Word and Excel.
5. Requires satisfactory typing and computer skills.

Working Conditions:

1. Requires ability to work in a fast-paced, multi-tasking environment.
2. Requires a positive team building attitude that works well with others.

Additional Requirements and Agreements:

1. This job description is intended to describe the level of work GENERALLY required of the person performing this job function. Other duties may be assigned as needed to support the agency's needs.
2. This job description is not intended as a contract and is subject to change and revision by management without advance notice.

I HAVE READ, UNDERSTOOD AND AGREE TO ABOVE, AS WELL AS BE EVALUATED BY THIS JOB DESCRIPTION

Employee Signature: _____ Date: _____
 Manager Signature: _____ Date: _____

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SHOMO-MADSEN INSURANCE
 22 E. Main Street • Marshalltown, IA 50158
 641-753-6691 • Fax 641-752-5360

PERFORMANCE EVALUATION AND DEVELOPMENT

Person Reviewed: _____ Job Title: _____ Period Under Review: _____
 Hire Date: _____ Hire Salary: _____ Current Salary: _____ Reviewer: _____

KEY QUALITIES: (5 = Exceeds Expectations; 4 = Above Expectations; 3 = Meets Expectations; 2 = Below Expectations; 1 = Fails to Meet Expectations)

KNOWLEDGE: 1 2 3 4 5	QUALITY: 1 2 3 4 5	QUANTITY: 1 2 3 4 5	ON-TIME: 1 2 3 4 5
INITIATIVE: 1 2 3 4 5	TEAMWORK: 1 2 3 4 5	ATTITUDE: 1 2 3 4 5	ATTENDANCE: 1 2 3 4 5
COOPERATION: 1 2 3 4 5	LEADERSHIP: 1 2 3 4 5	EDUCATION/ICE: 1 2 3 4 5	APPEARANCE: 1 2 3 4 5
DOCUMENTATION: 1 2 3 4 5	ACTIVITIES: 1 2 3 4 5	OFFICE DRAMA: 1 2 3 4 5	NON-PRODUCTIVE TIME: 1 2 3 4 5

CUSTOMER SERVICE WINS/FAILS: _____
 STAFF/TEAMWORK WINS/FAILS: _____

KEY ACCOMPLISHMENTS IN CURRENT YEAR	KEY EXPECTATIONS FOR UPCOMING YEAR
#1 _____	#1 _____
#2 _____	#2 _____
#3 _____	#3 _____
#4 _____	#4 _____
#5 _____	#5 _____

Employee Signature: _____ Date: ____/____/____ Compensation Change: _____
 Manager Signature: _____ Date: ____/____/____ Bonus: _____

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Meaningful feedback FUELS performance

- ❖ 80% of employees who received feedback in the last week are FULLY engaged
- ❖ Employees are 3.6 times more likely to agree they are MOTIVATED to do OUTSTANDING work when their boss provides DAILY/WEEKLY feedback as opposed to ANNUAL feedback.
- ❖ Daily/WEEKLY feedback allows REAL-TIME, on-the-fly adjustments
- ❖ Meaningful, timely feedback retains talent & energizes purpose-driven talent!

Best-in-class managers use ongoing conversations to deliver energizing feedback that celebrates successes and calibrates performance.

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CELEBRATE ACHIEVEMENTS

- ❖ Make EDUCATION an investment, not an expense.
 - Reward designations and licenses!
- ❖ Lead with POSITIVITY
 - ❖ Typical parent provides 10 negative reinforcements to every ONE positive reinforcement
- ❖ When Recognition/achievement is a regular part of the work culture and evaluation goal progress increases by 30%.
- ❖ Management is HARD! Manage your managers
 - 46% of middle-managers are looking to change jobs due to stress!

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