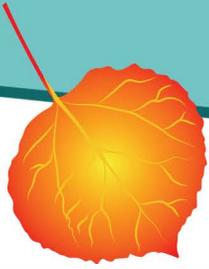


# HIRING AND FOSTERING DYNAMIC CSR's IN *Rural America*



If there is one resounding challenge I hear when visiting with agency managers it is that they are struggling to hire and maintain staff. I have an approach that I think can enable anyone to hire not just someone, but someone dynamic regardless of the job you're hiring for or where their business is located. I will elaborate some of my theory behind this in the 3 step outline.

You need people and people are everywhere. Sounds simple, even ridiculously obvious but don't give up on me yet. Allow me to elaborate. I think the way in which we go about staffing our businesses should be adapted to embrace the many changes influencing life today as we know it. The tried and true standard of finding employees would be to either post the position or contact a recruiter, which anyone reading this is likely already quite skilled at, so my suggestion is to perhaps round out your recruitment process with an alternative approach. This technique starts with recognizing that you meet potential employees every day, because you have to interact with people every day. Why not slow down and engage with some of these people long enough to measure potential value? Let me break this down into steps and examples:

## 1. DEFINE WHAT YOU WANT IN YOUR NEXT CSR.

Again sounds simple right? I am suggesting you spend a little more time on this particular step as it not only will help you find who you are looking for, but it will also help you encourage growth in your already established staff. Think about what the ultimate customer service representative would be within your agency and then take out a note pad (some old school practices are still my favorites), write down what attributes or skills you want your potential CSR to have, and then rank those in importance. I have made a very simplified example below to utilize in explaining this concept:

1. *Honesty*
2. *Positive Attitude*
3. *Helpfulness*
4. *Problem Solver*
5. *Prompt*
6. *Licensed*
7. *Prior Insurance Experience*
8. *Respectful*
9. *Quick Learner*
10. *Adaptable*
11. *Professional appearance*

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Defining your idea of what you are looking for is half the battle. If you take your time and really put some thought into this step it will not only help you find an employee but also help you re-structure your approach and expectations of your current staff.

*Write. It. Down. Seriously, this is key.*

## 2. REALIZE THAT PEOPLE YOU MEET EVERYDAY ARE YOUR POTENTIAL EMPLOYEES.

Now that you have defined what the position you are looking to fill is, the fun begins. Yes, I said fun. Why does this process have to be tedious? You are looking to bring a person into your work place that you will spend a significant amount of energy and time with. Shouldn't you enjoy the process of getting to know people? Hopefully you will. Even those of you that don't love getting to know new people can certainly recognize the importance of the process I am explaining in this article.

You meet people every day and these are your potential employees. When you run errands, buy groceries, go out to eat, go to the movies, attend social events, or go to church. You meet people and if you start to observe them in a different way you can start a preliminary interview of a possible new employee. Here is an example:

*“To have employees that truly suit your company and your expectations, you should clearly define and communicate those effectively and often.”*

Let's say you are at a restaurant with a group of friends, your waiter is clearly in a bad spot because the restaurant is packed and they are short two employees. Even so the experience is not horrible due to the way in which the waiter handles the situation. Maybe he communicates clearly, gives you an appetizer to keep you satisfied until food arrives, leaves the water pitcher, and keeps a good attitude despite the tough circumstance he is in because his co-workers didn't show up. In this example your potential employee just showed you that they had a good attitude, that they were adaptable, and also a good problem solver... three of the items from your list (maybe four if their appearance was acceptable). This person might be worth talking to a little more. Having dinner in an understaffed restaurant might have just landed you a potential CSR. Seriously this is really that easy. Is there a super friendly attendant at the drycleaners that you always look forward to seeing when you drop your clothes off? Why? What attributes does this person have that might potentially make them a good employee for you? Think back about all of the interactions you had last week during your day to day errands. Likely you can recognize a few examples even now.

The other wonderful part of this approach is that you can figuratively dip your toes in the water without jumping in. You can engage this person in a conversation, ask a few questions and see if they perhaps employ even more qualities that you are seeking. If you like what you hear, ask them to visit you in your office and see if they might have an interest in working with you. Not everyone will be a perfect match or be interested. This is the equivalent to posting an ad, but your odds are much better to find the right fit for your office.

### **3. CLEARLY DEFINE YOUR EXPECTATIONS IN THE NEW EMPLOYEE'S ROLE.**

Fast forward – assuming you made it successfully through steps one and two and have now hired a new CSR, the process is not complete. It is equally important to structure the initial phase of bringing someone into a new work environment to ensure that both of you communicate properly. Clearly define your expectations within the role of the new employee, and let them know what is most important to you and how they can meet your expectations. Commit to a specified time frame in which you will engage in training the new employee in daily, weekly, and monthly increments and make it a priority. Encourage feedback so the new hire can feel part of the company quickly by engaging in constructive conversations with you and supervisors. Lastly, always keep the list handy of what defines the ultimate CSR and continually guide your employees into improving in their roll. Sign them up for classes, perform training, give constructive criticism, encourage them, and reward good behavior.

Simply put, in order for you to have employees that truly suit your company and your expectations, you should clearly define and communicate those effectively and often.



#### **ABOUT THE AUTHOR**

Lori Herrington serves as Marketing Director for Aspen MGA, a division of Allstar Financial Group, an Atlanta based holding company with multiple specialty MGA's across the country. Aspen MGA is partnered with Home State County Mutual Insurance Company for business in Texas and based in Flower Mound, Texas. Additional information can be found at [www.AspenMGA.com](http://www.AspenMGA.com). You can also find Aspen MGA on LinkedIn, Twitter, Facebook, and Pinterest.