Get your staff working together—plan and hold productive meetings

By Grace Bauer

"How do they expect me to get anything done if I have to attend meetings all the time?" Sound familiar? Such statements as this are heard quite often from agency employees. But if the agency plans on being around for a while, the principals better hold meetings. Holding efficient meetings will secure continuity, keep goals going in the right direction, increase efficiency, and increase overall revenue. Efficient and productive meetings are the key.

When should you hold meetings? Who should attend? What about an agenda? How do you make sure everyone participates? These are the main areas to think about when holding productive meetings—meetings that will increase efficiency and revenue.

When and who
Every individual in the office should attend meetings, from upper management to customer service representatives, from processors to the receptionist and file clerk. If the agency has five or fewer employees, meetings should be held on a weekly basis. Even though employees in a small office can communicate freely everyday, they probably aren't talking about work. These weekly meetings should focus on specific agency goals of increasing efficiency and revenue.

In larger agencies, meetings should be held on a weekly basis by department; in other words, commercial lines, personal lines, sales, administration, accounting, etc. Meetings should be held between agency principals and management. Since the departmental weekly meetings will focus more on their own areas, complete agency staff meetings should be held monthly. These meetings will focus more on the overall office goals and objectives. Holding meetings on a regular basis will keep all employees focused on the department's and the agency's goals, thereby increasing efficiency and revenue of the entire agency.

The agenda
The agenda is an important part of a successful meeting. The agenda needs to be concise and include all areas critical to running the agency. Agenda items include such areas as company issues, agency progress, employee concerns, procedures, and the marketing plan.

When reviewing agenda items, make sure to keep discussions to a minimum so you have ample time to cover all items. Make sure you have a good facilitator overseeing the meeting. If one person becomes too long-winded, even if it's an agency principal, stop them and give the option of discussing the matter at a later date. The meeting needs to keep going, and issues need to be reviewed and settled.
The length of meetings is a common problem with agencies. Make sure your meetings are successful. Stick to your goals and increase efficiency and revenue.

**Participants**
How can you get everyone to participate in meetings? Ask them questions. At first, you may not get much of a response, but you may be surprised. And you may not like the answers, but most likely they will respond to your questions. Go around the table and ask each person how they feel about an issue. Just by the way they answer, you'll know if they understand the issue.

It is important to get every employee participating. Make sure everyone understands the issues and the goals of the agency. When this is accomplished, the agency works as a team to increase efficiency and revenue.

Start recognizing your goals today! Get your agency working together. Hold meetings on a weekly basis. Make sure you have a concise, efficient agenda and stick to it. Keep discussions to a minimum. And, finally, get everyone involved. Start asking questions and focus employees on the agency's goals.

*Grace Bauer helps insurance agencies put together customized insurance procedural manuals to secure consistency, protect against errors and omissions, attain security, and increase efficiency. She can be reached at (800) 896-4226.*

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