



ASK THE INSURANCE RECRUITER

The Complete Collection of 2019 Articles by Mary Newgard



A NOTE FROM THE AUTHOR

Talent management unites every insurance agency in the quest for greatness. No matter your company's size, location or specialty, everyone can agree that employees are their most valuable asset. Just because we can all see the road ahead doesn't eliminate the stumbling blocks that pop up along the way. Each broker faces unique challenges recruiting, attracting and retaining insurance talent. That's where *Ask the Insurance Recruiter* comes in.

In April 2012, I published my first article through Insurance Journal, "Agency Management Challenges- How Money, Motivation and Morale Connect". The response was overwhelming and led to a series of webinars about recruiting through Insurance Journal's *Academy of Insurance*. I give Andrea Wells, Editor in Chief, all the credit in the world for seeing the need to offer more resources to agency owners. As you'll see in this e-book, 2019 was the start of regular content for IJ readers about talent acquisition trends.

As you read these articles, I encourage you to find your agency's story. Jumping off the page is surely an issue or situation you've faced. I hope in my commentary you also find a solution.....but if you don't, email me, and we'll make it a 2020 piece!

All the best and happy reading. ~Mary

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Has Our Company Partnered with a Bad Recruiter?

The most popular “Ask the Insurance Recruiter” article in 2019 was July’s Partner or Pariah? 5 Hacks to Improve Your Experience



By Mary Newgard

Working with Recruiters. This was inspired by the negative reports I hear from insurance organizations about working with search firms. In this article I can give pieces of advice for you to vet a recruiting firm and set boundaries for engagement.

Given the article’s popularity, and the continued struggles employers have with finding the right partner, I’m taking the subject a step further. This article assumes that you’re currently using a recruiter to help fill jobs. However, warning bells are going off. If you have experienced any of the following signs, then you should find a new staffing partner.

Situation #1 (Pre-Interview)

“The candidate quality and due diligence is sub-par.”

This isn’t your first rodeo and you sense when a recruiter is flinging in resumes. When this happens, you should also assume their screening techniques are limited. Don’t ignore your suspicions. Bad recruiters don’t talk to candidates. They only email them. They parse details from their resume to pose as information they’ve gathered in a phone screen. Poor candidate in-take leads to poor interviews and hiring outcomes.

Your Solutions:

- Call out the recruiter. Hold them accountable for a better standard of submission.
- Require additional information prior to an interview, like a completed questionnaire or application along with candidate specific details.

Situation #2 (Interview)

“I never heard from the recruiter.”

Relationships are built on communication. Bad recruiters treat the process as a

transaction not a consultation. You don’t receive status updates on the search. They are slow to help set up interviews and never debrief after the meeting. You’re flying blind and doing most of the heavy lifting. You start to wonder what you’re paying for.

Your Solutions:

- Set boundaries and expectations.
- Require a weekly search update.
- Indicate you may utilize other recruiters or close the search if things keep going this way.
- Ask for details on how and when they prepare applicants for interviews.
- Make the recruiter handle tough conversations with candidates like declinations and compensation gaps.

Situation #3 (Sourcing)

“The recruiter doesn’t know anything about insurance.”

There are 19,000 staffing firms in the U.S., many of which are highly specialized by location, industry or discipline. Bad recruiters are posers. They say ‘yes’ to any job assignment giving you the impression they have insurance industry experience. Even worse, the recruiter has a narrow focus within the industry. There are big differences in the way insurance companies and agencies recruit. Don’t assume all insurance recruiters are created equal.

Your Solutions:

- Get historical information about their placement history. Have them answer, with accuracy, details about candidate compensation, availability and recruiting challenges in your market.
- Have them recite who your competitors are, and which ones are off-limits for sourcing.
- They should have mastery over multiple search management and sourcing strategies.
- They should offer up references.

Situation #4 (Post-Hire)

“The hire failed, and the recruiter didn’t do anything about it.”

You’re in sales, so you know there’s



always an element of conflict management. Recruiting is sales but unfortunately a lot of recruiters fall short at this juncture. Bad recruiters don’t honor guarantees. They bait and switch on the refund or promise a free replacement (and then we’re back to no communication).

Your Solutions:

- Lesson learned. Never work with the recruiter again but don’t rule out future partnerships. You need outside partners for a complete hiring strategy.
- A failed hire should hurt you and the recruiter. If they take it to the extreme and get squirrely about backing up the guarantee, then push a refund to a credit on a future hire. ■

Food for Thought

5 Ways to Vet an Insurance Recruiter

Don’t wait until the process begins to do some investigation. Try these five due diligence methods:

1. Ask for client references
2. Talk to placed candidates
3. Read online bios
4. Seek out reviews
5. Research social media

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Compensation Is Your Agency's #1 Recruiting Tool

Q&A

Q: I've seen your name in *Insurance Journal* and its often tied to compensation data. I'm doing an internal compensation benchmarking exercise. Do you have industry data on agency positions?

—Samantha in Human Resources

Q: Do you see a lot of agencies paying higher commissions to men? I recently discovered that in our agency validated female producers earn 20% less than validated male producers.

— Kelly in Sales

Employers find it difficult to hear that the entire kit and kaboodle of recruiting boils down to money. Insurance agencies would like to think there's more to the story — work/life balance, career development or great culture. While all these factors are important to job seekers, the truth is if you offered the exact opposite work environment but awesome money you can still hire experienced talent. I know this because I've seen agencies with horrible reputations (hint ... everything is on Glassdoor) that pay 30% more than the market and still manage to bring on new hires.

Questions like the two I received this past week are proof that compensation is the biggest recruiting factor in today's insurance job market. I don't think it's an accident that I received these two calls within a day of one another. It's worth noting that the same subject is on the minds of companies and candidates.

Here's how to make compensation a focal point of your recruiting strategy.

The Rule of 10

The more things change the more they stay the same. In April 2016 I wrote a piece for *Insurance Journal* titled "What Should I Pay My Client Service Employees?" where I outlined The Rule of 10. "Client managers seek out a fair, competitive increase. Most service professionals want a 10% or \$10,000 increase." After four years this rule still holds true. It will take \$62,000 to recruit a CSR who currently makes \$55,000. You have to offer \$85,000 to recruit an account manager with a current salary of \$75,000. Lateral moves and marginal raises don't work to attract talent. Small merit increases of 3-5% won't retain employees either.

Compensation Includes Remote Employment as a Priority

LinkedIn's Emerging Jobs Report for 2020 backs up a statement I said all last year. U.S. workers want remote jobs. LinkedIn's report indicates, "Remote work becomes mainstream. Previously considered a 'perk,' remote work is quickly becoming a priority for many. More than 40% of millennials say flexibility to work from anywhere is a priority when evaluating job opportunities."

Does your company want to attract the next generation of young talent? Start offering and monetizing remote employment and this will become your top recruiting tool.

Pay Equity. End of Story.

Can you empathize with Kelly, the producer who asked me about pay disparity occurring in her agency? Such an overt situation will lead her to look for a new employer. Now imagine any other person's feelings and suspicions about not being paid fairly.

When you embrace compensation as a recruiting tool, you bring issues to light that are meaningful to prospective job seekers. Huffington Post cited a study

by New America that showed the gender pay gap also pops up in parental leave. "According to the survey, 71% of fathers who took leave to care for a child or family member reported that the time off was at least partially paid by their employer. 57% said the leave was fully paid. Meanwhile, only 52% of mothers said their caregiving leave was even partially paid. Just 33% took fully paid leave." 



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Food for Thought

Pay Transparency — Another Reason to Put Money Front and Center

Start sharing salary ranges in your job advertisements. LinkedIn surveyed over 5,000 talent professionals in its Global Talent Trends 2019 report. Employers and candidates cited the following benefits of pay transparency:

- Streamlines negotiation;
- Ensures fair pay;
- Filters out those who'd decline;
- Allows interviews to focus on other things.



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5 Signs You Need Help for Client Service Openings

In 2020 the average time it will take an insurance agency to hire an experienced Account Manager will be three and half to four months. When I tell clients this, one of three responses follow:

Surprise: "Wow, really? I never would have guessed."

Confirmation: "Yep. I understand. It was the same way last year."

Fear: "Oh no! I better figure out a plan."

Experienced is the operative word. It will not take you as long to find CSRs, assistants and analysts with less than two years of career experience making less than \$45,000. These candidates apply through job boards and attend career fairs. However, the more compensation and experience increases so does the challenge of finding qualified candidates because commercial P&C, employee benefits and high net worth personal lines account managers:

- Do not apply as frequently through job boards.
- Are categorized as passive job seekers.
- Fall into a broad compensation range of \$70,000-\$175,000.
- Job tenure is two to three times greater than CSRs and assistants.

5 Signs You Need a Recruiter's Help for Client Service Openings

Unique: This account manager role feels set apart, unusual and more challenging than previous openings. Examples can

include a) supports an executive producer's book, b) the accounts are large and complicated, or c) there's been retention or culture problems within your team.

Capacity: 40-80 open job requisitions isn't unheard of with larger regional brokers and are typically managed by much smaller HR departments than alpha broker's talent acquisition groups. It's hard to keep up with application flow, find time to recruit on more difficult postings and manage each interview process to the fullest.

Location: The \$150,000 account executive you need doesn't exist in a 200-mile radius. Referral sources and your existing database are useless. You're staring down the barrel of relocation candidates.

History: Your last two \$85,000 account manager jobs took four months each to fill. Your LinkedIn connections are tapped out, and you've tried to recruit everyone at a competitor. You want a faster fill rate on the next opening with a more diverse candidate pool.

Structure: You're not sure if the position requires a full-time employee. What if this turns out to be a 30 hour/week job or it's on a new team that might not be stable enough for a permanent hire? Here comes contract and portfolio careers.

2020 Agency Client Service Recruiting Trends

Your 2020 motto should be: "If it requires insurance experience it requires recruiting."



- Client Service openings account for 60% of an agency's recruiting time and cost.
- 3:1 employee benefits to P&C job opening ratio.
- \$70,000-plus salary roles; expect a 90-120 day fill timeline.
- Job boards are weakened after 30 days of posting. The most successful methods of sourcing service candidates are: Employee referrals; Direct Solicitation from Competitors; and Social Media

Emerging Client Service Roles

Get ready for the migraines! If you have one of these openings on the horizon expect a more difficult search.



By Mary Newgard

Account Executive Roles + One

- Management/team leadership (the earth isn't flat, but a lot of service teams are).
- Consultants (leveling up the service team. The pivot from \$100,000 AE to the \$125,000-\$175,000 earner)

Actuaries with a Personality


- a.k.a. analytics/mathematical geniuses/Excel wizards who get out from behind a desk.
- Most prevalent in benefits, agencies want highly technical employees in heavy client facing roles.

Non-Traditional or

Vertical Product Lines

- Commercial P&C risk management divisions want account managers/account executives with niche expertise (healthcare, construction, transportation, environmental, cyber, management liability, so on and so forth)

When You Need to Call a Recruiter

My first response is any time but that seems a little self-serving, right?! My advice is to evaluate each job instead of making a sweeping generalization like, "We do or not work with recruiters." Look at what makes sense - the position, location, capacity and cost containment. Find a trusted partner; an advocate who knows how to tell your agency's story and is committed to the process no matter how long it takes. 

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Trendy Hiring Tactics For 2020

It could be 1920 or 2020 and the fact is when it comes to hiring some things never change. The issues insurance agencies face are consistent across the board:

- How do we source and attract top talent?
- How can we gain a competitive edge in the recruiting process?
- How can we ensure new hires are successful, long-lasting employees?
- How can we combat the talent shortage and fill openings quickly?

Thankfully answers to these questions might lie outside of the insurance industry. Human resources and talent acquisition groups in other business segments are pushing techniques that insurance organizations can adopt. Here are a few of the trendiest topics you can use to screen, recruit and secure top talent.

Virtual Resumes

Reviewing paper resumes are a no-brainer, but do you know about virtual resumes? According to ZipRecruiter, most candidates are cyber-vetted before an interview. Takes the Google search you've done one step further. A virtual resume aggregates all forms of online information about a candidate to complement a traditional resume. Examples include:

- LinkedIn profile;
- Personal websites and social media;
- Video bios;
- Infographics;
- Multimedia presentations; and
- Biographical information.



Why Compile Virtual Resumes?

1. Learn more about the candidate's social media behavior. Are they actively engaged online? Is this for personal or professional use? Do these posts positively or negatively match your company's culture, goals and open positions?

2. Audit and verify resume accuracy. According to HireRight's 2017 employment screening benchmark report, 85% of employers caught applicants lying on resumes/applications. This is up for 66% five years ago.

3. Supporting documentation. LinkedIn and other social channels allow professionals to upload documents, articles and presentations they've created so you can see their work product first-hand.

4. A list of references. Online recommendations and endorsements may be more honest and real-time than the standard 3-5 professional references listed on an application.

Virtual Interviewing

Phone screens will continue to be the first line of defense, but most hiring managers say there is no substitute for in-person interviews. This is where virtual interviewing comes in. According to Best Money Moves, with remote work on the rise, phone and video interviews will occur more frequently. How can you incorporate virtual interviewing?

- Zoom, GoToMeeting and Skype are your best way portals for a professional interview. Be careful with Facetime; it won't give you the same desired face-

to-face effect.

- Request the candidate's Skype username. This can be added to your applications, questionnaires or a segment of their resume.

Passive Candidates

Desperation seeps through even the most highly automated application process. Sometimes active job seekers become aggressive and you do

not want multiple applications cluttering your inbox. Social skills are the new frontier of writing job descriptions; it greatly improves passive candidate applicant rates. According to Page Up, the demand for social and emotional skills will grow across all industries by 26% in the United States.


Pro Tip: Your job postings should be littered with "skills of the heart" keywords such as:

- Collaboration;
- Agility;
- Communication; and
- Reasoning.

Portfolio Careers Are the New Contract

ZipRecruiter says by the end of 2020 more than 40% of the U.S. workforce will be "contingent workers." That's 60-plus million people classified as 1099 or "less than full-time."

How can you match contract workers with current openings? Insurance is a conservative industry yet toying more and more with adopting contingency workers. Portfolio careers describes job seekers in non-traditional roles.

- Update your Careers page with categories and keywords people can use to search openings: Direct Hire/ Permanent, Part-Time or Contract.
- Include this question in phone screens: "What type of employment status are you open to considering? Perm, Temp or Both?"
- Provide resources to 1099 employees. This is especially helpful for long-term contract employees. 

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By Mary Newgard

Idea Exchange: Ask the Insurance Recruiter

20 Ways to Reinvigorate Your 2020 Recruiting

What grade do you give your agency's 2019 hiring? If you think there's room for improvement, my advice is not to expect that using the same old tricks. 2020 ushers in a great opportunity to test new, creative and edgy recruiting tactics. Projections show agencies will hire just as many client managers and producers with a sharp increase in management, analytics and technology openings.

Recruiting is best summed up in three categories: Identify, attract and retain talent. Here are 20 ideas I encourage you to try for 2020 recruiting.

1. Campus Recruiting. Attend a college fair to strengthen your organic pipeline.

2. Phone a Friend. Clients and social networks are invaluable for attracting experienced, non-insurance sales talent.

3. Don't Post the Job. Job boards are effective for sub \$65,000 jobs, but better resources abound for pricier hires.

4. Double Employee Referral \$. For a tough-to-place job, double the employee referral bonus on that opening.

5. Make the Executive Cold Call. Hiring managers soon realize it's not so easy to pawn recruiting off on HR. They will be more invested in the hiring process.

6. Change the ZIP Code. Give 'remote' a chance to fill a senior account manager job. You won't be sorry. It will make the next service hire even easier.

7. Write a Blog. Advertise an opening in an article about your recent hiring success stories. Ask for referrals at the end.

8. Create a Video for LinkedIn. Pictures and videos generate the fastest 'impressions.' Those get shared and reshared all displaying your career opportunities.

9. Attend a Career Fair. You may be the only insurance employer, but if you're looking for IT, HR, accounting and admin staff, there's no better place to find them.

10. Recruit the Replacement. You just hired a new account manager. Who took his/her old job? Knowing that person = a promising future hire.

11. Compile an E-Marketing Brochure. How you sell to clients is how you sell to employees. Tout soft benefits, career advancement, volunteerism and company history. Send this to candidates before the first interview.

12. Find a Recruiter You Can Trust. Staffing firms are generalists. Recruiters are specialized. Identify difficult hiring projects and find insurance-specific recruiters with expertise on those positions.

13. People Love SWAG. If hotels dole out pens after a one-night stay, you can easily put together a care package for the new hire's first day

14. Ask Vendors for Resumes. You may be surprised how easily resumes are shared. All you need to ask is, "Do you have an applicant like this in your database? Can I have their info?"

15. Write an Offer on a Napkin. The point is do not fall in love with the interview process. Don't create steps for the sake of it. Make an offer after one meeting. Producers love it.

16. Signing Bonus. Relo assistance is not a dirty word. Nor is signing bonus or an employment contract. Want to lock

great talent down quickly and for the long haul ... provide an unexpected commitment.

17. Post Job Narratives Not Job Descriptions.

The three-page resume is dead and so is a lengthy job advertisement. People read articles, not novels. Be concise and interesting; make every job (even if it's the same title) appear unique.

18. Mock Presentations. Producers who can't work a room have high failure rates. Forget about business plans. Set up a mock presentation on a different topic – LeBron or MJ: Who is the greatest ever?

19. Invest in Applicant Tracking Software. How many times is the right candidate sitting in front of your nose? HRIS, ATS and CRM software improves tracking, documents origination and matches skill codes for future positions.

20. Talk to Everyone. Are you guilty of negotiating away recruiting? Is it easy to prioritize other business projects? You don't need to spend 35 hours of your week on recruiting. The easy fix with great results is to talk to every possible candidate. You gain market insight, find opportunity hires and build relationships with people that make it much easier to approach them about future roles. 



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Lacking Structure: My Agency's Biggest Recruiting Problem

Q&A

Q: What are you seeing out there for experienced insurance talent? I dread recruiting because it's never easy to find quality people. What are agencies doing to fill critical service roles and recruit producers?

A: Insurance agencies feed too much into the narrative: "The market is really tight. There are more jobs than candidates." This isn't untrue, but if your agency approaches recruiting with a defeatist mentality, then you're going to struggle. The single biggest hiring issue for insurance organizations, no matter whether the agency has 50 or 5,000 employees, is a lack of structure. They treat the process the same for every position, lump all the resources into one bucket and hope to have successful, equal outcomes.

So, how do you know if your recruiting problems boil down to a lack of structure? If you're guilty of some or all of the following, then yes, you need more structure.

You Wouldn't Sell Without a Plan. (Recruiting Is Sales.)

I cannot imagine a sales leader telling his or her producers to prospect a \$5,000 revenue small-business unit (SBU) account the exact same way as a Fortune 500 deal. Your agency knows time, resources and messaging are different based on the target client. The same is true in recruiting. You don't have a solid recruiting plan if you're doing these things:

- Your job postings look the same for every opening.
- You believe a posting on LinkedIn or Indeed will attract producers.
- You think most positions can be filled in 60 days.
- Your interview process is the same for an AE and a manager.
- You hate recruiting fees and avoid third-party help at all cost.

Let's Start With Postings. (Money Doesn't Solve Problems.)

This is the "fling it out there and see what sticks" approach. Job applications are the best way to fill open positions, right? Wrong. Here's how to tell if you rely too much on postings to start your process.

- Your first thought is how much it costs per click to post/sponsor/boost a job.
- Your applicant flow sharply decreases after 14-21 days.
- You threw 90% of the applications in the garbage.
- You're only seeing the same, reread resumes.
- You aren't interviewing any passive candidates.

HR Handles Our Recruiting. (But Openings Affect Everyone).

A hands-off approach to recruiting is



By Mary Newgard

unfair to HR. Lack of engagement is a real problem among insurance executives. Hiring is frustrating and difficult to navigate when you don't have structure to lean on. You are pushing 100% accountability to HR if you do the following:

- 1) You haven't provided clear, concise information on required skills and experience.
- 2) You're "open" on compensation without defining the floor or ceiling to screen candidates.
- 3) You take longer than 24 hours to respond to submissions.
- 4) You haven't said if you want one, two or 10 interviews, and what's involved in each.
- 5) You haven't asked nor care about performance in postings, cold calls or employee referrals.

Food For Thought

There is very little hiring data available for insurance agencies. Capstone compiles its own data on an annual basis to look at trends and help agencies structure recruiting plans. Does this information surprise you or seem familiar?

- 60% of agency hiring is account manager/account executive related.
- 30% of agency hiring is producer related.
- 10% of agency hiring activity is management or technical driven (i.e., claims, marketing and loss control).

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Money Talks in Every Aspect of Recruiting



By Mary Newgard

Q&A

Q: I have a very good, seasoned VP in claims who manages our largest claims, advocates for clients and impacts the agency's brand by managing vendor and carrier relationships. I would not want to lose this employee. I'm concerned based on internal discussions that our agency may not be "at market" from a compensation standpoint. Can you provide guidance on how this could affect retention or future recruiting?

A: The impact of compensation on recruiting has been an evolving discussion since my career began in 2006. When I entered the industry, compensation was never brought up during screening, the referral or interviews. Because it was hush hush, offers were entirely predicated on the question, "What do you currently make?" Today, compensation is visible on job postings, shared in referrals, talked about in every interview and is phrased, "What is your compensation expectation?" You're falling behind the times if you do not embrace and encourage compensation discussions. It is your best weapon in the fight for talent. It fights pay inequality. It attracts a diverse workforce. It retains your most valuable employees. Compensation should be a part of every aspect of your recruiting process.

Include Salary Information in Postings

Influencing candidates to apply for your job starts with addressing their biggest question mark. 98% of job seekers and employees say it is helpful to see salary ranges in job listings. Candidates experience a more positive search, and employers see a direct correlation with successful recruiting. According to Glassdoor:

- "Providing pay information at the beginning of the recruiting and interview process helps candidates self-select out, reducing the number of resumes needed to get to hire in half." (What Are Salary Estimates in Job Listings? April 2019)
- "Hiring decision-makers report when they hire informed candidates (about salary realities) they see better retention rates and more productive and more engaged employees." (Glassdoor Survey, August 2017)

Repeated Topic of Interview Conversation

Time kills all deals, but as we venture deeper into low unemployment waters, I believe our shtick should change. Money kills all deals.

I can't tell you how disruptive compensation is to the offer process. There's tremendous value in discussing compensation with a candidate during every interview. If you approach the topic strategically, it will not be overkill. Here are reasons you should never miss an opportunity to talk about compensation:

- 1) Achieve 100% perfection with your offer.
- 2) Candidates don't know when and how to bring it up. Take the lead. Open the door for them.
- 3) Discover in real-time changes to compensation expectations.
- 4) Find where priorities lie between salary, bonus, commissions, benefits, expenses, etc.
- 5) Being proactive means you have authority to be reactive when the counteroffer hits.


Acknowledge and Retain Key Employees

Staffing forces us to focus on new things, but what's the point of taking dirt from one hole just to fill another? Recruiting is an ongoing issue. You constantly have to re-recruit your own employees.

Mercer's 2018/2019 U.S. Compensation Planning Survey said, "Companies risk losing employees to competitors that may offer better salaries and the opportunity for more career growth." The survey found 78% of employees list Retention Concerns as their top factor that influences compensation decisions. This is higher than other categories like sourcing new talent and adding bench strength.

To prevent employees from becoming job seekers due to frustration with compensation, here are some tips to leverage compensation and increase retention.

- With **Account Managers**, focus on pay equity. While merit percentages are on the rise (3%+ according to SHRM 2019) people can get more in the open market. Organize, prioritize and incentivize client service managers based on book size, vertical/niche portfolio and segmentation of roles (marketing, client-facing responsibilities, etc.)

- **Producers** will gladly discuss new and renewal splits. In fact, they do in peer groups, so you want them talking with you. Invite salespeople into learning about ROI and expense management. Even newbies on a validation schedule should learn how formulas work. If not a yearly discussion, let life stages be the kick for you to discuss comp with your sales team. Producers change employers for better comp plans when they marry, have children, buy a house, pay for college and are within 15 years of retirement. 

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Partner or Pariah?

5 Hacks to Improve Your Experience Working With Recruiters



By Mary Newgard

Q&A

Q: How am I supposed to use a recruiter when my company had a horrible experience with a firm?

A: A great question and an excellent starting point for my advice on working with third-party recruiters. I've been in the staffing industry for 13 years. I know the good and bad of this business. In any relationship there's accountability on both sides. The key phrase here is 'relationship'. Do you see a recruiter as:

- a) A valuable resource for your business and a strategic, knowledgeable partner
- b) A headhunter who's a necessary evil with large fees and bad faith guarantees

Your viewpoint has produced your history with recruiters. That future can change. Here are five ways to improve your experience working with recruiters.

It's All About Engagement

1. Time Has a Direct Effect on Success.

The recruiter never referred any candidates, but perhaps you waited too long to phone a friend. Call recruiters no later than 30-days from the start of a search. More time to do their thing – research, solicitation and candidate vetting – means more referrals for you.

2. Contracts Are Not 'One Size Fits All'.

Insurance recruiting agreements come in many forms – contingency, engaged, retained, contained and RPO. Did your recruiter educate you on the differences? Terms, conditions, guarantees and fees are negotiable. Find out your options. Then make the choice knowing you get what you pay for.

3. Create Complementary Boundaries.

Have a conversation that defines Right of Referral. Talk about where you and the recruiter will source candidates. There's no reason to trip over each other or recreate the sourcing wheel. Understanding one another's resources sets basic rules of engagement.

Communication and Transparency

4. Representation Matters. Recruiters are an extension of your company brand. Job advertisements, social posts and calls with candidates should be your words coming from their lips. Ask to review job advertisements. Hear their elevator speech. Be in control of your narrative.

5. Feedback Is Next to Godliness.

Glassdoor's 2019 survey through The Harris Poll found 58% of job seekers listed "clear and regular communication" as most important to a positive search experience. Recruiters care about the same issues. Give feedback within 24-hours of referrals and interviews. Provide specific reasons for rejecting applicants. Otherwise they turn their attention elsewhere just like candidates.

Food For Thought:

Recruiters are your most valuable interpersonal hiring tool. According to Glassdoor's 50 HR & Recruiting Stats for 2019, "Recruiting and HR success in 2019 and beyond will be about understanding candidate and employee needs and crafting experiences to meet them." Don't rely exclusively on commoditized recruiting tools – Indeed, ZipRecruiter, LinkedIn, Facebook and so forth. Who better to craft experience to meet candidates than a human being who understands your business and advocates for it? Let a recruiter become that for your business.



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A Clear Path For Agencies Hiring Young Account Managers

As a recruiting partner to insurance agencies, so much of my role is about sourcing account manager candidates that I believe a bigger piece of the hiring puzzle is overlooked. What happens to agencies once they onboard millennials? What is needed to train, manage and retain young customer service representatives (CSRs) and account managers? Agencies carry a sizeable burden for developing the insurance industry's next generation. Here's how client service directors tackle these challenges.

Menda Speckels, commercial team leader, Higginbotham & Associates.

"Millennials need a clear path with defined expectations. They ask three questions: 1. What's my role?; 2. Where's my career path?; 3. How do I get there?"

Speckels described a communication balancing act. CSRs want to address the next step in their career quickly, highlighting the importance of on-the-job learning. Higginbotham U was started

for this reason. Designed for employees with little to no insurance experience, it's coursework that teaches the basics to become an account manager. Speckels said it's less of the "learn it yourself" model she grew up in but has been effective with employees.

Stephanie Zsittnik, vice president, Employee Benefits, Cross Insurance.

"It seems every agency is so desperate for talent, they'll overpay, especially at junior levels. Given my recent experience hiring people in the 22-28-year-old range, I would guesstimate the average tenure is 18 months. Benefits analysts are particularly interested in growth, and quick!"

Zsittnik spoke to the competitive nature of the Boston market (which isn't unlike many other insurance markets fighting for talent) where she's seen \$15,000-\$20,000 raises to recruit analysts with just a few years of experience. She's had to change her expectations about job tenure when reviewing resumes. She's pleased with a solid two years in a job

for a junior support role.

Zsittnik's advice to retaining young staff, "Keep them engaged. Provide professional development opportunities, external and internal. As managers, we can only control so much, but it's important to compensate fairly and provide opportunities. Stay true to yourself and your business values. If someone is interested in moving to a firm that will pay them 20% - 30% more with minimal experience, let them go. Focus on the long-game."

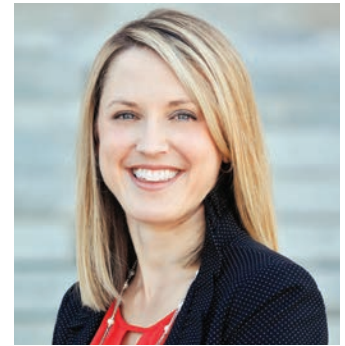
Julie Stannard, director of client services, Ironwood Insurance Services.

"I think millennials get a specific reputation for wanting to be promoted quickly and to be paid very well. In some cases that's true, but it hasn't been my overall experience. Every situation is more about the person than a sweeping generalization. I find many young people to be humble. Coming out of college, their attitude is one of a desire and a willingness to learn."

Retention being a critical piece of the process, Stannard runs toward, not away from, conversations with employees about compensation. Her mantra is, "It's a candidate's market. There are tons of opportunities out there. If you want to be with Ironwood, and earning more money is a goal, then I will work with an employee to create a plan that's realistic."


She offers more advice for hiring young service talent:

- Start people out as interns. Hiring them upon graduation has a huge



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impact on retention.

- Lean into recruiting tools. Find profile assessments that work based on personality and aptitude.
- Be transparent in the interview process. Stannard describes her environment as service-intensive, where the answer isn't always obvious or easy to get to. The agency's strong culture, despite challenging roles, is endearing to young people. They want to learn a lot and have fun.
- Onboarding is more than just paperwork. She recommends a 30-day review that continues consistently for the first 12 months. Her biggest questions are, "Does the job align with your expectations? and "What has been your experience?" This way, employee's perceptions, which are the reality, give a glimpse into their happiness and longevity. 

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Remote Employees: Your Biggest Game Changer to Fill Openings Now

Q&A

Q: I'm the Talent Acquisition Director for a national brokerage and have been recruiting within insurance for 10 years. I've seen all the highs and lows when sourcing experienced talent however 2019 seems to be particularly difficult. My hiring managers don't understand the shortage. I think our problem is we're always going after the same local talent pool. Does remote really work?

A: Dear X, please tell me you're a Seinfeld fan because then this reference will make a ton of sense. Remember the birthday party with George and the clown? The clown said "You're living in the past, man! I bet you want to say the same thing to your agency's executives. This isn't 2009. There isn't an abundance of candidates out there. Remote is absolutely the way to go. It is the biggest gamechanger in the recruiting process. Here's information to strengthen your case."

Change Zip Code, Change Speed to Fill

The three core components of a recruiting project are:

1. **Experience** (years of experience, insurance expertise)
2. **Source** (direct competitor, related insurance organization)
3. **Location** (local, relocation or remote)

Two of the three are typically non-negotiable, fixed features of a search. For example, you require a Commercial Lines Account Manager to have five years of experience in construction at another retail brokerage. Currently, it takes agencies 90-120 days to fill this opening. Four months is an

eternity to make a \$65,000 to \$85,000 hire. Expanding the role to any qualified candidate, regardless of location, cuts the fill timeline in half. Relocation is rarely an option and nearly impossible to recruit. Meet experienced professionals where they are and expand your talent pool over and over again.

Who Is A Remote Employee?

Global Workplace Analytics' most recent report (January 2018) defines "remote" employees as:

- Anyone who works more than 50% of the time in a non-compete office.
- 3.2% of the U.S. workforce now work from home at least half the time.

- The typical telecommuter is college-educated, 45 years old-plus, earns a salary of \$58,000 and works for a company with more than 100 employees.

The common perception is that only national insurance organizations have infrastructure and technology to handle work-at-home employees. The data above shows that couldn't be farther from the truth.

Want Vs. Need

Terminology is interchangeable - virtual, telecommute, work-at-home and remote. You absolutely need these employees to fill critical roles that require insurance experience. Identification is just one benefit to the hiring process. Here are three more:

1. **Be an Employer of Choice:** Offer the flexibility and benefits people want.
2. **Remain Competitive:** Two to three days/week at home is considered remote status. Your competition has defined programs in place.
3. **Retain Top Talent:** Next to compensation, work/life balance is the biggest reason people change jobs. It's hard to leave an employer that allows you to work from home, in your sweatpants and greet your kids at the bus stop. This is the reality of successful work-at-home benefits.

How to Get Started

Identify people within your organization or hire new employees that excel at man-



By Mary Newgard

aging off-site staff. Not every manager has this capability. You need appropriate leadership for policies to be fair, consistent and long-lasting.

Managerial traits for a virtual workforce include:

- Communication skills geared towards digital services rather than exclusively via email.
- Reliability where the manager's word is gospel and builds trust.
- Motivation and rewards-based philosophy so employees don't feel overlooked or marginalized.

Food For Thought:

The right vernacular may set you on a course for remote integration. Employment is increasingly being described as Concentrative Work (at home) and Collaborative Work (at the office) to denote different working arrangements. - *Global Workplace Analytics study, January 2018.*

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In Their Own Words: Why Producers Change Jobs



By Mary Newgard

Q&A

Q: We have a zillion newbies and plenty 50-plus year old veteran producers. I've tried the out-of-industry route. Frankly, my agency isn't good at training. I want experienced, 'hit the ground running' sales talent at other agencies. How do I recruit producers from my competitors?

A: I've learned over the last 13 years of recruiting producers that you need empathy and understanding. The best way I can illustrate this is **"In Their Own Words."**

Below are interviews from several producers Capstone assisted in 2018. I hope you find their testimonies helpful.

Why Did You Decide to Start a Job Search?

"I saw massive opportunities in the marketplace. I'm half the age of the average, 55-year-old insurance agent. I wasn't going to sit around and wait for turnover to bring me a better deal."

"It was all about job security. My agency's management was in turmoil. There was constant hiring and firing."

"My compensation didn't line up with the revenue I was bringing in."

"I needed to find a better fit - the niche I was selling in, location/commute and culture."

"Inexperienced leaders were running the agency. Half the time the sales manager would blow off the meetings he set."

"The agency couldn't take me to the next level. I was going to be stuck in small groups forever. They couldn't help me 'punch above my current weight class.'"

"It was like being in an abusive marriage. My compensation was horrible. Staff retention was a joke. Once I realized, 'Oh this is how it's eaten the heart of there.'"

"My search coincided with major life changes. I have a young and growing family. My priorities and long-term goals shifted."

What Did You Experience in Your Search?

"Most agencies came across hungry to write new business and grow organically with young people."

"The interview process was one of two ways. Either the agency cared only about my relationship building potential or they grilled me on technical insurance knowledge. I found the nitty, gritty insurance scenario style to be very cumbersome. I went with the agency that employed the first strategy. I had one, one-hour interview and got an offer."

"Insurance wasn't my only option. I was considering other industry sales positions simultaneously. I just wanted speed and efficiency. Not all interviews were like that."

"I spoke with a wide range of agencies - size, operations and management of new producers. The biggest differentiator was their approach to timing. I liked the ones with a sense of urgency. Lackadaisical = lazy + uninterested in me."

"I had to battle the reputation of my current firm. I worked hard to convince agencies I wanted more and was willing to work for it."

"My suitors came by word of mouth. Four agencies courted me until the end. Early on, I knew I didn't want to stay in a churn and burn corporate environment."



Some made me feel like a number even in the interview process.”

“I was looking at multiple roles, in and out of the industry, in the local market and involving relocation. It was a lot to balance but helped me make the most informed choice possible.”

Why Did You Choose Your New Agency?

“They had the infrastructure to teach me.”

“They were willing to invest in resources beyond account managers and markets. They had tangible products besides what carriers offer. They were a true, full-service shop.”

“The company was the first to


make me an offer. It met my criteria. They were speedy and transparent.”

“I clicked with the executives. I felt the president understood my personality. He didn’t come across like hiring me was a part of a numbers game.”

“If I didn’t choose this agency, I would have gone out on my own. Knowing this, the agency set up a contract and comp plan that allowed me to feel like an entrepreneur. They pay commission across all lines. They won’t pigeon-hole me into one identity.”

“Employee-owned with complete transparency. I interviewed with the service staff. They were candid, and it was refreshing. I chose

culture; their people actually enjoy coming to work.”

“The agency I chose met my short-term needs (position and resources) with long-term plans (flexibility, supporting my passions, compensation and expanding my skill set). I was convinced of their culture when so many of the employees I met had 20-25 years of tenure. I interviewed at agencies where two years is considered good tenure. That wasn’t where I wanted to go.” 

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How and Where to Start When an Agency Leader Retires

Q&A

Q: Our executive team wants to start the recruiting process for a chief operating officer. The current leader is within two years of retirement. We prefer to be ahead of the game and have the current COO groom his successor. How do we develop a search? When should we begin recruiting candidates? – **Melissa in Virginia.**

A: Recruiting to fill senior positions due to retirement is a little bit like deciding to start a family. You think you have a lot of lead time, but surprises always pop up along the way. That happened to me. I bought a great, sporty new car six months before I learned I was pregnant with twins. You can imagine how well two car seats fit in the backseat. Had I known how quickly a minivan would be in my future, I never would have bought that car!

An Outline for Planning a Leadership Search

Timing (12-24 months before date of hire)

1. Dialogue with the pre-retiree.
 - a. Do they want to slow down or shed current responsibilities?
 - b. Will they quit cold turkey or want a post-retirement consulting contract?
 - c. Do they want to participate in the search process?
 - d. Is their retirement date fixed or could it change?
2. How many hats do they

wear? Create an exhaustive list of duties and responsibilities.

Is internal promotion a viable option? It's a waste of time to build a search only to eventually promote from within.

Profile (9-12 months before date of hire)

Close your eyes and imagine the perfect resume.

1. Do you require insurance industry experience?
2. How many job changes are too many?

3. At heart, is this person rooted in sales, service or pure management?

While the answers seem obvious, the trap for many companies is simplicity. You will be tempted to negotiate away the profile when you struggle to source candidates. This stage keeps your commitment firm.

Experience (6-9 months before date of hire)

Do you want an equal to the current leader or someone with raw potential?

1. A mirror image: A younger baby boomer who matches 99 percent of all job responsibilities.
2. An upstart: The gen X or older millennial with executive maturity who fits 50 percent of the role. Where they lack skills, you are willing to train.

Beyond generational qualities, this is your opportunity to recruit for the future. Does the search address issues like diversity and pay equity?

Compensation (the last piece to launch the search)

Salary is one piece of a bigger puzzle. What substance will you offer?

1. Relocation: How much, applicability and payment method? Payback protection clause?
2. Signing Bonus: Yes or no? For what purpose? To what max?
3. Equity, Ownership Stake: Immediately or after X



By Mary Newgard

- years of tenure?
4. Performance Variables: Percent of the first year total compensation package? Long term, weighted on individual performance or company profitability?

Food for Thought: Executive Recruiting

Don't start by saying, "We Need to Find Candidates." That's a reactionary mindset. That mentality works when you're scrambling to backfill a \$60,000 account manager job. It lets applicant quality and availability determine your hiring profile.

Do say, "This Is A Huge Opportunity for Our Company." Your firm's brand, story, mission, history, vision and culture are impactful in a search. Be strategic. Plan and execute. Figure out how to put your best attributes on display. Your firm's DNA will attract passive job seekers.

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Agencies Promote Soft Benefits to Gain A Distinct Recruiting Advantage

Q&A

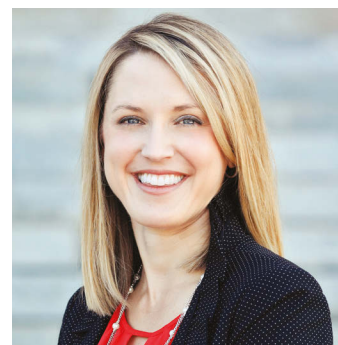
Q: Our agency is committed to providing a positive employee experience. We are dedicated to staying on top of the latest and greatest benefits. As a recruiter in the insurance industry, I want to pick your brain on what perks you know are valuable to insurance professionals? - *Sarah in Chicago*

A: The conversation about soft benefits isn't "what" but "why and when." Recruiting is an emotional process successfully done by building relationships. It's professional speed dating. How companies perceive soft benefits affects their ability to leverage those perks in recruiting.

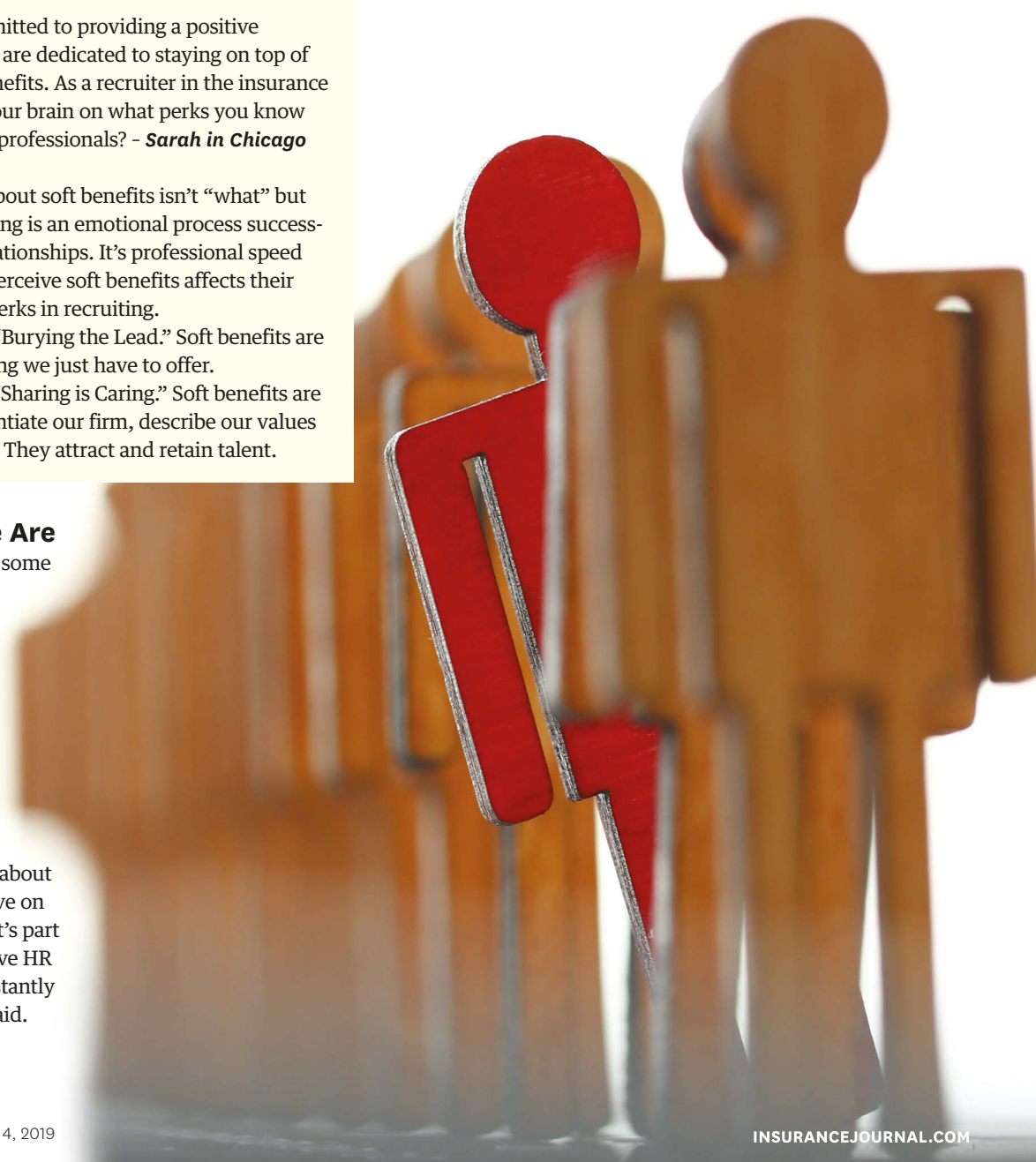
- **Old School Mentality:** "Burying the Lead." Soft benefits are a handout. It's something we just have to offer.
- **New School Thinking:** "Sharing is Caring." Soft benefits are powerful. They differentiate our firm, describe our values and signify our culture. They attract and retain talent.

It's Part of Who We Are

"When I first brought up some of these new ideas you would have thought I suggested we all go to the moon," said Michelle Trueblood, chief human resources officer at The Horton Group. She and Sarah Newell, talent acquisition manager (who's question spurred this article), are passionate about the impact soft benefits have on recruiting and retention. "It's part of a strategic, comprehensive HR strategy that we know constantly needs to change," Newell said.



By Mary Newgard



“For example, a relaxed dress code was once very cutting edge. It’s still great but we keep innovating for the best possible employee experience.”

Caring for employees is in Horton’s DNA. They recognize that soft benefits can cost money. The agency sees this as a great way to reinvest in the company and maintain its independence. Friday break-fast, “food galore,” on-site gyms and fitness programs, on-site dieticians and health clinics are just a few examples of what’s available. Trueblood and Newell also challenge the conventional thinking that soft benefits don’t yield tangible results.

- They’ve witness employee referrals become the agency’s No. 1 source for new talent.
- Millennials going through summer internships often convert to new hires because they haven’t found another company with comparable benefits.
- Teams tapping into soft benefit programs are among the highest performing and have the best retention.
- Social media followers have increased exponentially because of testimonials.

Getting to the Heart of What Matters

Jeff Lightner, president and CEO of Marsh & McLennan Agency’s Midwest Region had an eye-opening experience about soft benefits one snowy winter morning. An employee commented in the elevator that she wished it was 20 degrees not 22 degrees so the Weather Rule would be in effect. Lightner asked, “Would wearing jeans really have given you a better outlook on coming to work today?” She said yes. In that moment, Lightner said soft benefits was about “getting to the heart of what really matters.”


Lightner has since witnessed a “pay it forward” mentality blossoming throughout their staff. “They want to give back because of what they have received,” he said. He’s seen them band together for one another during tough times, raising money to help a colleague with a family

crisis. He said, “I really have to come up with another word for team-building. The executives and I can sit around, dreaming up team building outings, but nothing is better than when they go into the community and serve alongside one another.”

Casual dress and Volunteer Time Off (VTO) are just two examples of where he sees soft benefits making a direct impact. Additional programs include healthy, fresh food delivered daily impacts employee health and plan costs. A formal work-from-home program became the perfect Disaster Recovery Plan. Most importantly, Lightner said these programs hold leaders accountable to get involved. “What is your social impact?” is the first question Millennials ask in an interview,” he said. “There was a time our managers fumbled their answers. Not anymore. They know what MMA’s doing in the community because they are doing it too.”

Food For Thought

Five Places Where Your Agency Should Promote Soft Benefits

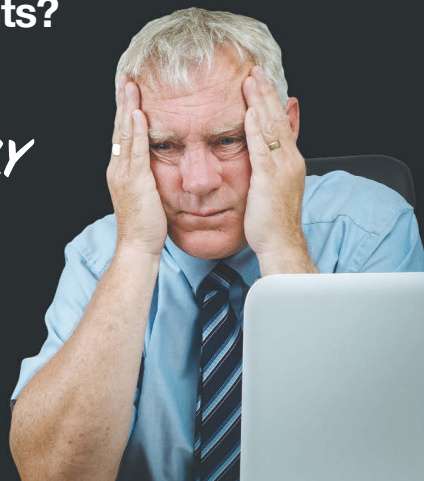
1. The Interview. Ask candidates what they desire. Share your company’s offerings.
2. Benefits Overview. Right next to what employees expect; share the unexpected.
3. Social Media. Pictures say 1,000 words when employees love your awesome perks.
4. Promotional Materials. Employee testimonials, Glassdoor reviews and career pages.
5. Job Advertisements. Mentioning compensation and benefits sharply increases applicant rates. 

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Ask the Insurance Recruiter

3 Female Agency Leaders on Opportunities in Insurance

I was so intrigued by McKinsey & Company's "Women in the Workplace 2018" study that I decided to flip the script for my first column of 2019. From a simple question, "What are opportunities for women in the insurance industry?" came fascinating answers from three female agency leaders. They are at the forefront of addressing issues of inclusion and diversity. They are advocating for change in ways I believe many insurance organizations can learn from.

A Voice That's Heard

You'd be smart not to say the phrase "women should have a seat at the table" to Barbara Bentley. Twenty years of human resources experience tells her this cliché doesn't age well. As chief talent officer for Catto & Catto in San Antonio, Bentley focuses on attracting, engaging and developing diverse talent. "It's more than women just having a voice," she said. "It's about women having a voice that's heard."

Bentley designed plans for female employees to "move beyond being a believer to becoming a builder." With a commitment to equality and engagement, the agency's culture has been forever changed for the better. "Diversity began once we expanded the ways we thought about growth," she said. "We unlocked a lot

of potential." Bentley spoke about an evolving culture where men and women engage in real-time issues, from setting performance excellence standards to working on a project to change the agency's management system. "How do you give people opportunities to develop and have leadership?" she asks. "Invite more voices into initiatives."

Breaking Down Barriers

Then came my conversation with Karla Combs, chief operating officer at Lipscomb & Pitts Insurance in Memphis. After 25 years with the agency, Combs' perspective on the role of women in the insurance industry doesn't start and stop with her own leadership journey. She is proud of the diversity within the agency's sales teams. Lipscomb & Pitts has six very successful female producers across personal lines, commercial lines and employee benefits. Even more notable, four began their careers in account management.

"We approached them about moving from service to sales," Combs said. "All the credit goes to them for turning the opportunity into a huge success. The part I'm proud of is initially they didn't necessarily see the potential in themselves, but we did and really wanted to foster their possibilities."

Having successful women in sales breaks down barriers and stereotypes. "Perception isn't always reality," Combs said from watching two of the producers concentrate in male-dominated verticals like construction and trucking to seeing young male producers co-sell with experienced saleswomen. She's gone as far as to make sure they hire more men in support positions.

Belonging and Mattering

At BKS Partners, two of the original founders are women and female representation exists through all levels of the company. Elizabeth Krystyn, founding partner of BKS Partners, said they could rest on their laurels, but they don't. "When you look traditional, you have to work harder to be different," she said. "In BKS' case, we don't look traditional and yet still strive for diversity and inclusion. We're building



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Capstone Search Group

a colleague-centric, 'family inside of a larger family' small group model," she said.

"Transparency and communication is respect," a mantra Krystyn said has led to full engagement and productivity for female and male employees. Twice a year, the agency issues a survey of 10 questions categorized around safety, belonging and mattering; topics which she recognizes are important to women. The results provide insight into how well BKS' culture fosters inclusion. It's a springboard for employees to share goals and support one another in "Welcome Activities." One new hire had 50 emails from BKS employees by her first day. "By planting the flag early on for engagement and community [between men and women], we're making diversity a part of BKS' everyday language." ■



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