

CPI Diagnostic

The CPI (Core Performance Indicators) Diagnostic is a comprehensive analysis of current operational structure. It identifies those CPI's which are at the heart of your business – Human Resources, Strategic Planning, Business Continuity Preparedness, Sales and Production Performance, Workflow and Technology.

The CPI Diagnostic will identify and plot your offices' unique indicators, allowing for an objective assessment of your current situation. From that starting point, you can set attainable objectives and build a strategic plan using those concrete indicators as your guide. The CPI Diagnostic will outline any potential obstacles that could block your path to success and offer next step solutions, including:

- ✓ Evaluation of standards within the office (documentation, processes, coding)
- ✓ Study of job descriptions versus what's actually being done
- ✓ Analysis of the work habits of your producers, CSR's and support staff
- ✓ Assessment of time management and scheduling
- ✓ Review of functionality and usage of your Broker Management System, Portals, Website and all other technology
- ✓ Evaluation of current reporting features as a management tool
- ✓ Status of strategic plan and its ratification throughout the office
- ✓ Effectiveness of the sales initiatives including New Business Production and portfolio development
- ✓ The 3 R's – Renewals, Retention and Referrals
- ✓ Client Segmentation and its role in day to day processes



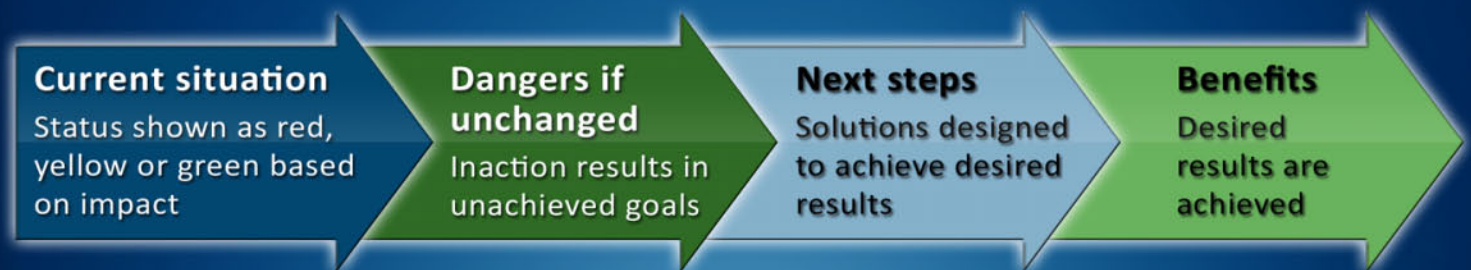
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NAVIGATING CLIENTS TO MEASURABLE SUCCESS

CPI Broker Dashboard and Summary – A sampler

The CPI Diagnostic begins with a two day in-house session that involves various members of your staff including Management, IT and Operations. Gradient Solutions will then compile and analyze the data, documentation and information collected, and create **The CPI Diagnostic Summary**. It will be presented in a half-day onsite session with Management in the weeks that follow the study. The Summary will indicate those areas of concern, outline the risk factors should no action be taken, and incorporate a Next Steps Recommendation Report. **The CPI Diagnostic Summary** will guide your business in the right direction and give you the right information you need to reach your goals.



Strategic Plan

- Does one exist?
- Has it been ratified with your team?
- Is it on schedule?

Sales

- Is there a Sales Manager?
- Is there a formalized sales plan?
- How is performance measured?

Processes

- Is there standardization?
- Is documentation freeform or fixed?
- Are there consistent reviews of how things are done?

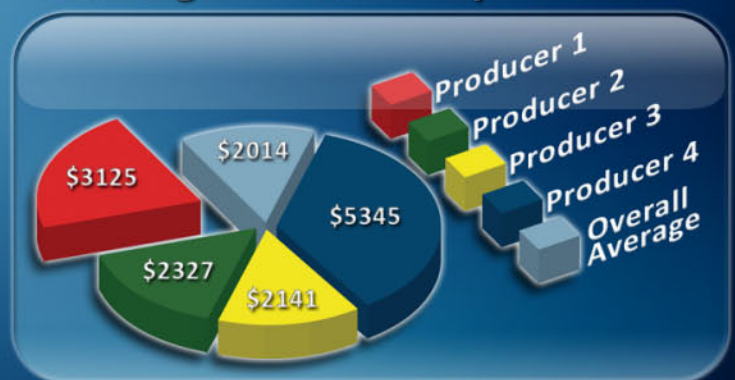
Technology

- How is everyone using the BMS?
- Does everyone use the same coding system?
- Reporting: can we tell how everyone is doing?

Human Resources

- Up to date job descriptions?
- Career development plan activated?
- How do I attract new employees?

Average Premium by Producer



Monthly Production

