



# Setting Your S.M.A.R.T Goals

*How's your agency's scorecard today? Are you on pace to meet your goals for this year? If not, do you know why?*

*If your goal is simply to "sell as much as you can," and there's no method of measuring these goals, you're doing yourself a disservice.*

*Start off on the right foot by setting S.M.A.R.T. goals for yourself, and your agency!*



## First thing's first - what's a S.M.A.R.T goal?

SMART stands for:

**Specific** - Be clear in your goal and avoid ambiguity.

**Measurable** - Have a criteria in mind so you can measure your progress.

**Action-Oriented** - Ensure you have a list of actions that will help accomplish your goal.

**Realistic** - Make sure your goal is attainable and within reach.

**Timely** - Choose a start and end date for your goal.



## There are 3 types of goals you'll focus on:

### Operational Goals

Business success indicators such as written premium, renewal %, profitability, customer retention, PIF, policies per household, etc.

### Problem-Solving Goals

Designed to eliminate recurring problems within your agency and client interactions. Think written processes, systems and streamlining strategies.

### Innovative Goals

Designed to improve on the level of service to customers, work flow/environment, internal processes, marketing your agency, etc. Basically, how will you take your agency to the next level this year?

## To create your S.M.A.R.T. goals, you'll need to clarify these things:

### Your Agency Vision



Your goals should always be moving you toward your company vision, so it's important that you and your staff are clear on what that is. If you haven't, craft a **clear and compelling vision that encompasses everything you want to create this coming year for yourself, your staff, and your customers.**

### Your Agency Mission Statement

Your goals should align with your company mission statement. Write out a statement that incorporates **what you want to create, who you want to serve, and how you intend to get there** this coming year and make sure that every goal you set is aligned with that mission.

### Your Core Values & Beliefs

What are the guiding principles of your agency? Think about all the **values that you want to stand for as an agency** and choose the 3-5 that are most important. These can be things like service, integrity, added value, streamlined interactions, ease of use, etc. Find the words that resonate with you, your vision and your mission.

## Now, get brainstorming!

Once you have those things in place, it's time to start brainstorming! Choose the type of goal you want to focus on, and come up with a list of **agency-wide and departmental goals.**

After you choose a goal, ask yourself these questions:

- 1 What are your **strategies and plans** to accomplish your goal?
- 2 How will you **measure** your progress and success?
- 3 What **specific actions** will you take every day/week/month to achieve this goal?
- 4 What is your **timeline**? What is your goal completion date?
- 5 How will you **communicate the progress and results** of your goal to your team?



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