

A dark blue silhouette of the Hawaiian Islands is positioned at the top of the logo, within the upper arc of the circular frame.

Client First

Three small, light blue triangles are arranged in a triangular pattern to the right of the 'Client First' text.

ATLAS
INSURANCE AGENCY

Kakou – All of Us

Support one another in our “One” Atlas approach which means being collaborative and supportive that creates a professional environment underscored with a deep sense of caring for all team members.

=

Client Success





“Make, Speak and Keep Commitment”

“Become the differentiator that sets our business apart and provides the foundation of success”

Purpose

“It’s a cultural strategy that places clients at the core of everything we do”

Expectations of Initiative – Culture Strategy

- STEP 1 - Make the Commitment
- STEP 2 - Speak the Commitment
- STEP 3 - Keep the Commitment

“This is our goal for this important Initiative”

Why Were You Selected?



Unit Representation and
Leadership



Transparency



Collaboration and
Consistency with all units



Learn from one another



Effectively implement this
important initiative and
continuously evaluate the
program's effectiveness

What is Your Role?

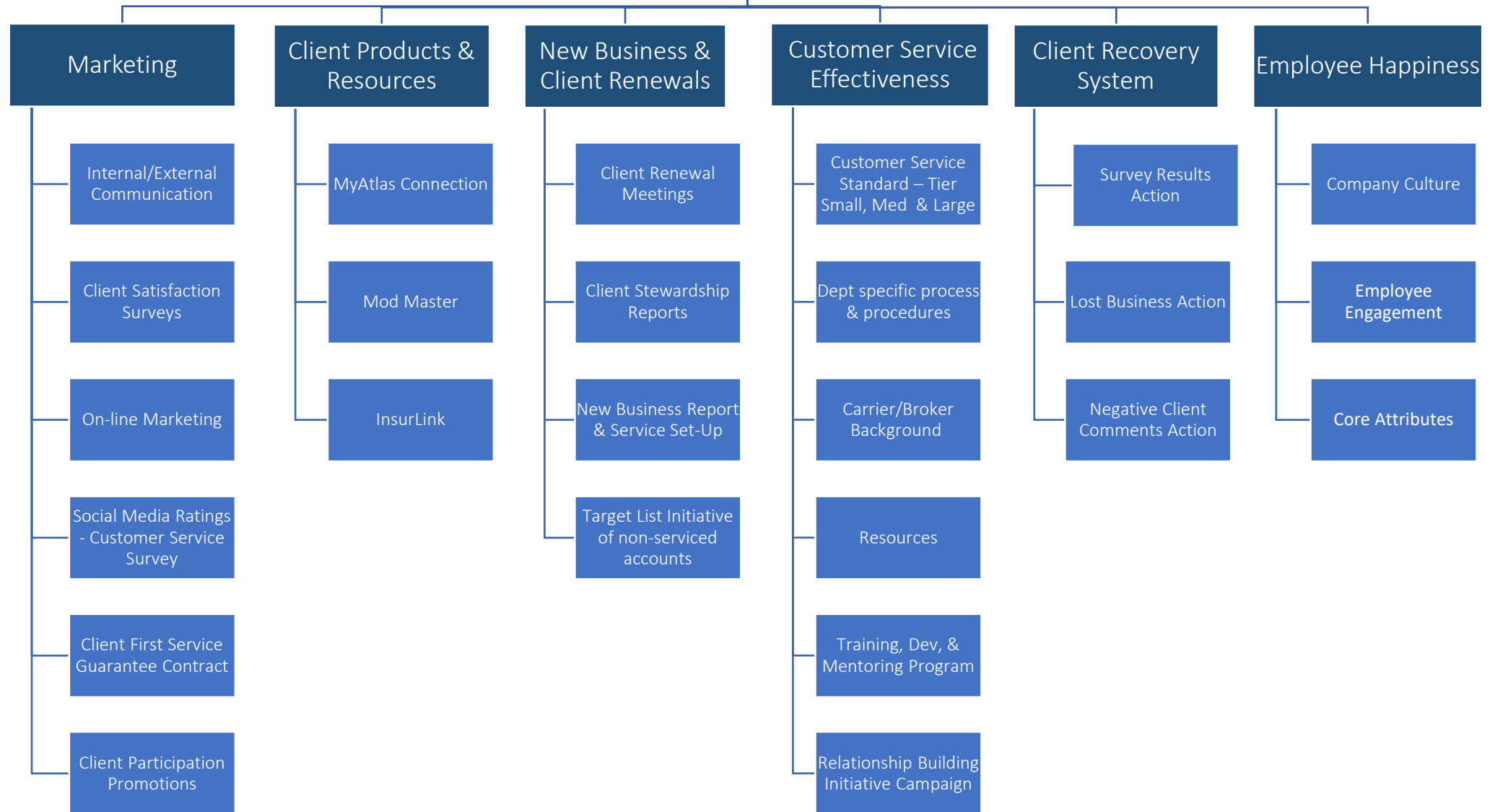
- 3 to 5 year commitment!
- Shared Responsibility
- Bring your creativity and collaboration to this group!
- Attend Monthly – Quarterly Meetings
- Bring back to your units our initiatives and discussions with leaders and employees
- Responsibility for “Action Steps” created
- Representation in discussions and presentations to senior management on program status/results





How do we
organize this
effort?

COMMERCIAL LINES CLIENT FIRST PROGRAM



Marketing

- Internal & External Communication regarding initiative efforts
- Client Surveys and Feedback
- On-line Marketing- Customer Service App
- Social Media Ratings & Client Service Surveys
- Client First Guaranteed Contract
- Client Participation Promotions



Client Products & Services

- MyAtlas Connection
- ModMaster
- InsurLink



New Business & Renewals

- New Business Reports & Service Set-Up
- Client Renewal Meetings
- Client Stewardship Reports
- Target List Initiative of Non-Serviced Accounts



Customer Service Effectiveness

- Customer Service Standard
- Dept. Specific Process and Procedures
- Carrier/Broker Relationships
- Resources – Reference Connect, etc.
- Training, Development and Mentoring Program
- Relationship Building Campaign



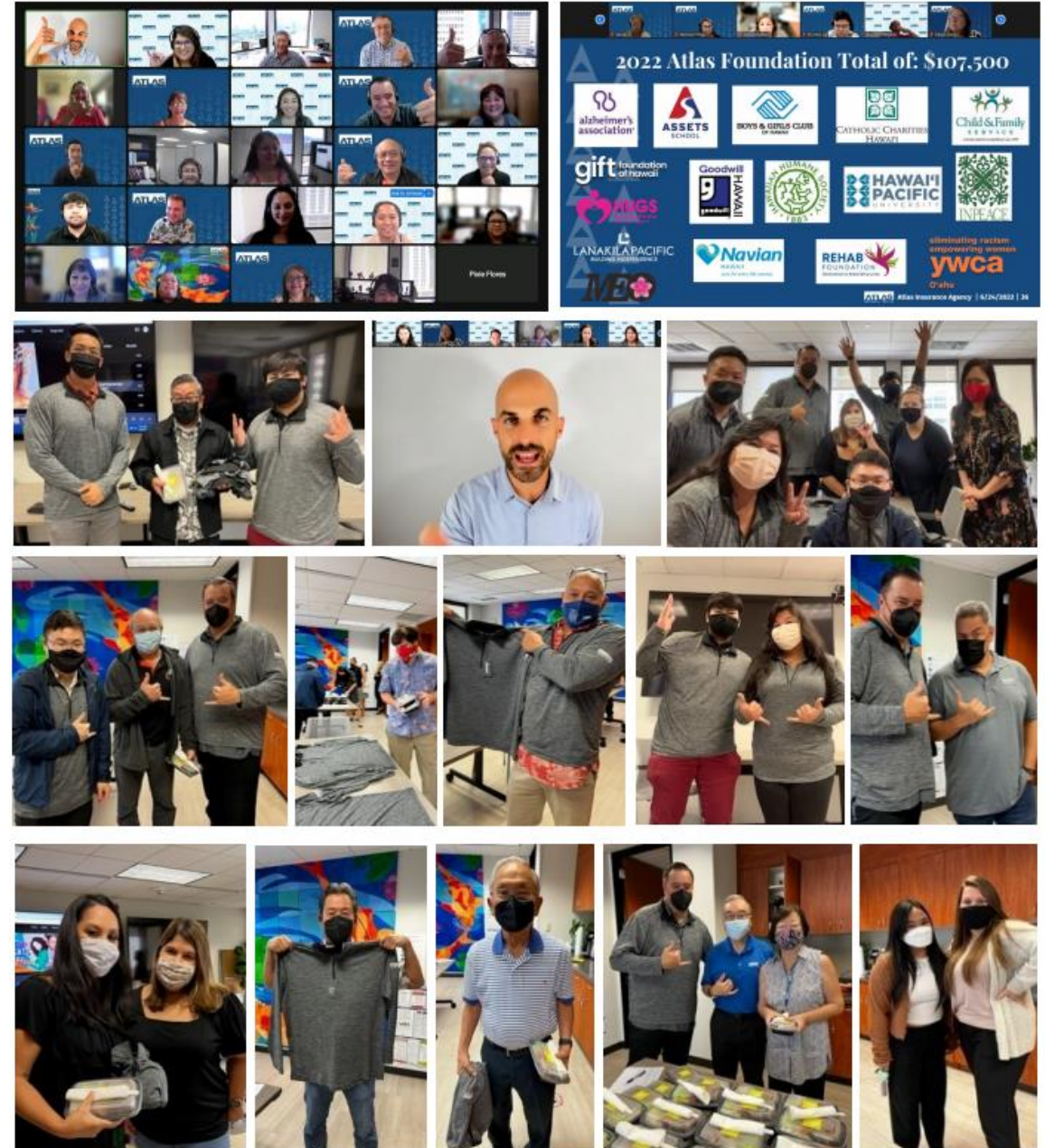
Client Recovery System

- Survey Results Action
- Pre-Lost Business Action
- Lost Business Action – Lost Business Report
- Negative Client Comments Action



Employee Happiness

- Company Culture
- Employee Engagement
- Core Attributes



Prioritization Exercise

Next Steps

- Complete First Meeting with Task Group - Welcome
- Prioritization Exercise – Create Initiative Timeline to share
- Schedule next meeting