



## **Thinking about the Five Star Agency Designation but not ready to commit?**

### **Consider a Five Star Preliminary Review.**

This is an abbreviated review that is led by a single review consultant. It is designed for agencies who are not quite ready for a full Five Star Agency review but want an independent assessment that provides initial direction and feedback on where improvements can be made relative to the Five Star Imperatives and Supporting Criteria. A Preliminary Review is conducted in one day and we request access to as many staff members as we can accommodate for interviews in a single day. All information, including the fact we are doing a review at an agency, are held in strict confidence.

### **This is what a preliminary review looks like and the process it follows:**

**Part 1.** A mutually agreeable date is chosen for your review. On that date, a review consultant speaks with all staff, or as many as can be accommodated on a single day. Interviews may be with individuals, in groups, in person or over the phone. Logistics are determined by the agency size. All interviews must be done in private areas to adhere to our strict confidentiality agreement.

**Part 2:** From interview feedback, the review consultant compiles a report that reveals agency Strengths and Areas of Improvement in relationship to the Five Star Imperatives: Customer Focus, Management/Leadership Excellence, Human Resources, Product & Process, and Future Success Initiatives. This should take the MAIA review consultant less than one day.

**Part 3:** The review consultant presents the report to the agency owners, this typically occurs within 1 week of the interviews. Strengths and Areas of Improvement are discussed as well as an overall impression of the agency in relationship to the Five Star Agency Designation criteria. Tips and suggestions on how to work on areas of improvement are also mentioned in the presentation.

### **Cost of a Preliminary Review:**

The cost of a one-day preliminary review is \$800.

Additionally, consultative assistance from MAIA associates is available to you to review and interpret your results, develop improvement initiatives, and help with accountability for meeting milestones on those areas of improvement you choose to target.

### **Savings:**

Agencies who decide to move forward with the Five Star Designation within one year of the Preliminary Review, will be credited \$250 against the cost of the Full Review.

**Note:** Most insurance companies recognize the value of the Five Star Agency Designation, and many have supported their agency partners in taking their first steps in the Five Star program. Contact your carriers to see if they will support your agency in the Five Star journey.

### **Interested?**

Begin the Five Star journey by speaking with Erin Schaaf, CPCU, MSIM, Agency Performance Consultant at (774) 573-3173 or ESchaaf@MassAgent.com.