



The process for the Full **Five Star Review** is as follows:

1. Mutually agreeable dates are established and a schedule set. A full review will take at least 3 consecutive days and the number of days is dependent upon the size (staff size and number of locations) of the agency.
2. All staff are interviewed on the first day (or more if needed) of the review. The interviews will be conducted one on one with the exception of owners and managers, their interviews are conducted with at least two members of the review team to one of them.
3. Confidentiality is given to the agency and all of its employees. We do not disclose the name of any participating agency until they have earned a Five Star Designation. All interviews must be conducted in private settings and information discussed in the interviews is also held with the utmost confidence. The team will not discuss or reveal any individual conversations. The more honest and open employees are with the team the more valuable of a report the team can deliver.
4. The day after the interviews, the review team meets off site and discusses their findings on each set of 17 criteria the program is based on. We discuss and confirm what each of us find to be the strengths and areas of improvement in each area. In order for items to make our report, we as a team must come to consensus on all of the areas addressed in the report.
5. At the end of this day, when we create the report, we grade each criteria. We follow a strict grading standard with 1000 points being the total points any agency can achieve. When an agency achieves a score of 700 points or higher, they earn the Five Star Agency Designation.
6. On the final day, we present the report to the agency. We highly recommend that all employees be present for this presentation. We will review all of our findings, have discussions about those findings and present the score that the agency received.
7. If an agency does reach a Five Star Status, 700 points for more, they must update their designation every 3 years with a renewal review process.
8. If an agency does not reach a Five Star Status, then they work on the areas of improvement and can come back at any time after the review to go through the process again. If an agency comes back within 1 year of the review, then we would do a 1-day follow up. If it is after a year then a full review would be required.

FAQ

Is there any follow up with this program?

That is up to you! We have business consultants available to you if we can be of any assistance in helping you on your continuous improvement initiatives, and we would be glad to help. We are happy to schedule follow-up visits at your agency, phone conversations, or video calls if we can assist with developing, implementing, and monitoring improvement initiatives. Use us as a resource for specific tasks, we are happy to help.

Also, once a Five Star Agency Designation is earned, there is a 3 year renewal requirement.

What criteria is this based on?

This is based on the 17 Points of Quality that underly the **Five Star Agency Designation's** Five Imperatives. To see a full description of this criteria, please **see attached**.

What size agency is this program designed for?

This is truly one of those times when you can say size does not matter! Small, medium, large -- it does not matter. The process is for anyone who wants to start working on improving their agency.

Is there a cost involved?

Yes, there is. The cost for this program is \$2,200.00 per day. Most insurance companies recognize the value of the **Five Star Agency Designations** and many support their agency partners in the **Five Star** program. You should contact your carriers to see if they would support you in this endeavor.

Who would be doing this?

The number of people on your review is dependent upon your agency size (employee count and number of locations) however the minimum number of review team members is two. The two members who always participate in the reviews are Heather Kramer, Vice President of Training, at the Massachusetts Association of Insurance Agents and Erin Schaaf, MAIA Agency Performance Consultant. Heather has done countless reviews of agencies and has been an integral part of the Five Star program since its design and inception in 1999. If other review team members are needed, it will be other MAIA staff that have been trained and performed reviews in the past.

Who do I contact if I am interested?

Please contact Erin Schaaf, CPCU, MSIM, Agency Performance Consultant at the Massachusetts Association of Insurance Agents. She can be reached at (774) 573-3173 or ESchaaf@MassAgent.com.

To learn more about the **Five Star Agency Preliminary Review**, please contact
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