

PERCEPTION PROFILE

This report describes the culture of your organization based on the perceptions of your associates. It measures the observations of associates in order to rate the effectiveness of your operations and to identify opportunities for improvement.

Company : Hamilton Systems

Participants : 17

Date : September 2011

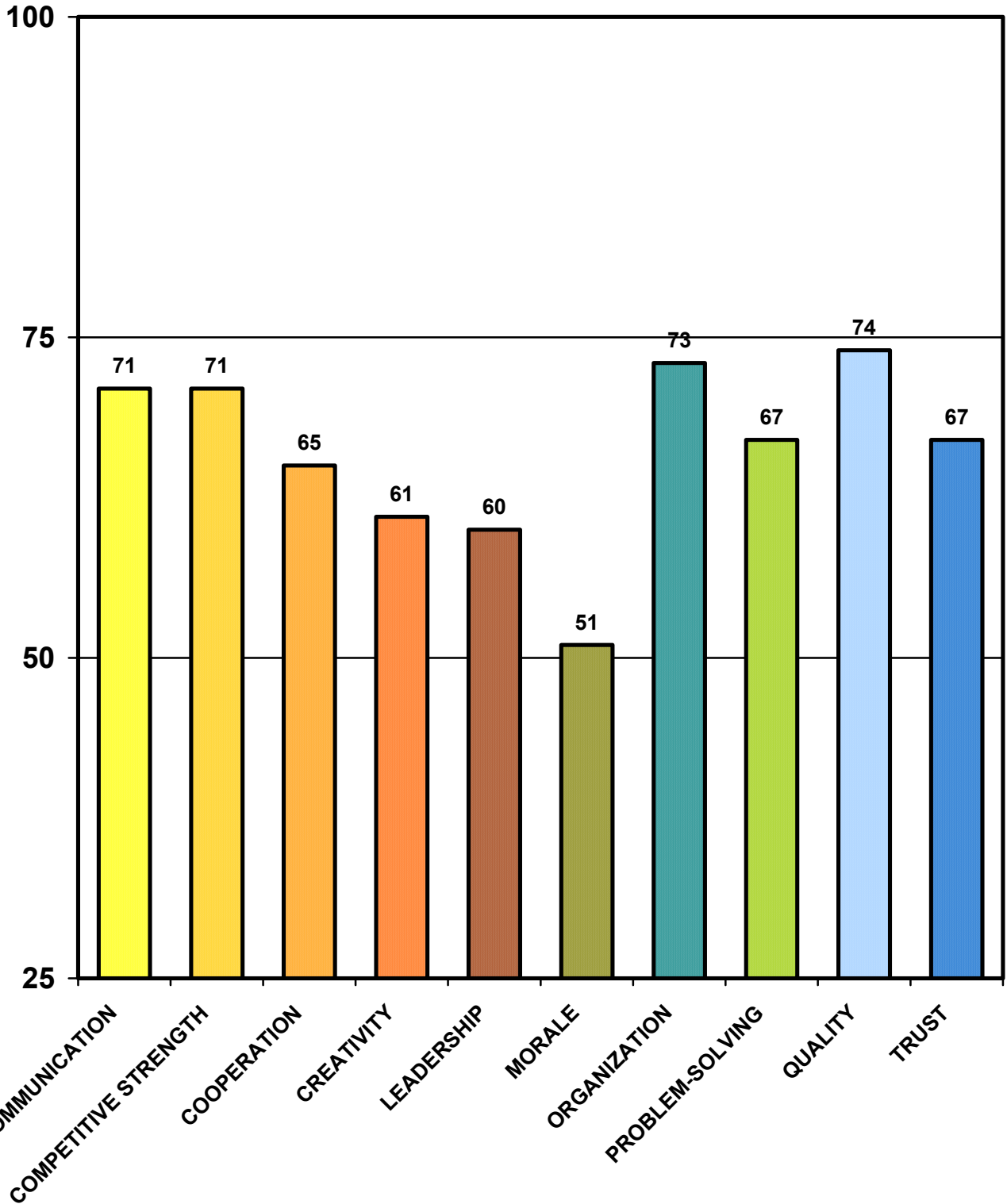
EFFECTIVENESS RANKING

How team members rated the organization's effectiveness in ten key categories

RANK	CATEGORY	RATING
1	Quality – Do people hear positive comments? Does quality attract people to the company? Are people emphasizing quality?	74
2	Organization – Do we have efficient systems and clear priorities to follow? Does the company work to improve efficiency?	73
3	Communication – How willing are people to listen? Are associates receiving the information they need? Are meetings effective?	71
4	Competitive Strength – Is the company focused on competing? Do they have the resources? Are you competing effectively for people?	71
5	Problem-solving – Are problems handled quickly, and are the right people involved? Do people have the resources they need?	67
6	Trust – Are people in the company concerned about each other? Do they keep commitments? Do they see trusting relationships?	67
7	Cooperation – Are people willing to help? Is leadership seen as cooperative? What happens to cooperation when things get tough?	65
8	Creativity – How much creativity is allowed in the organization? Is creativity encouraged in the company, and is it rewarded?	61
9	Leadership – Do leaders set clear goals, share a vision and provide support and encouragement? Are leaders seen as hardworking?	60
10	Morale – Do people see their coworkers as happy in their work? Do associates feel optimistic, and are they seen as enthusiastic?	51

PERCEPTION PROFILE

How often people in the company see signs of effectiveness



25 – Seldom

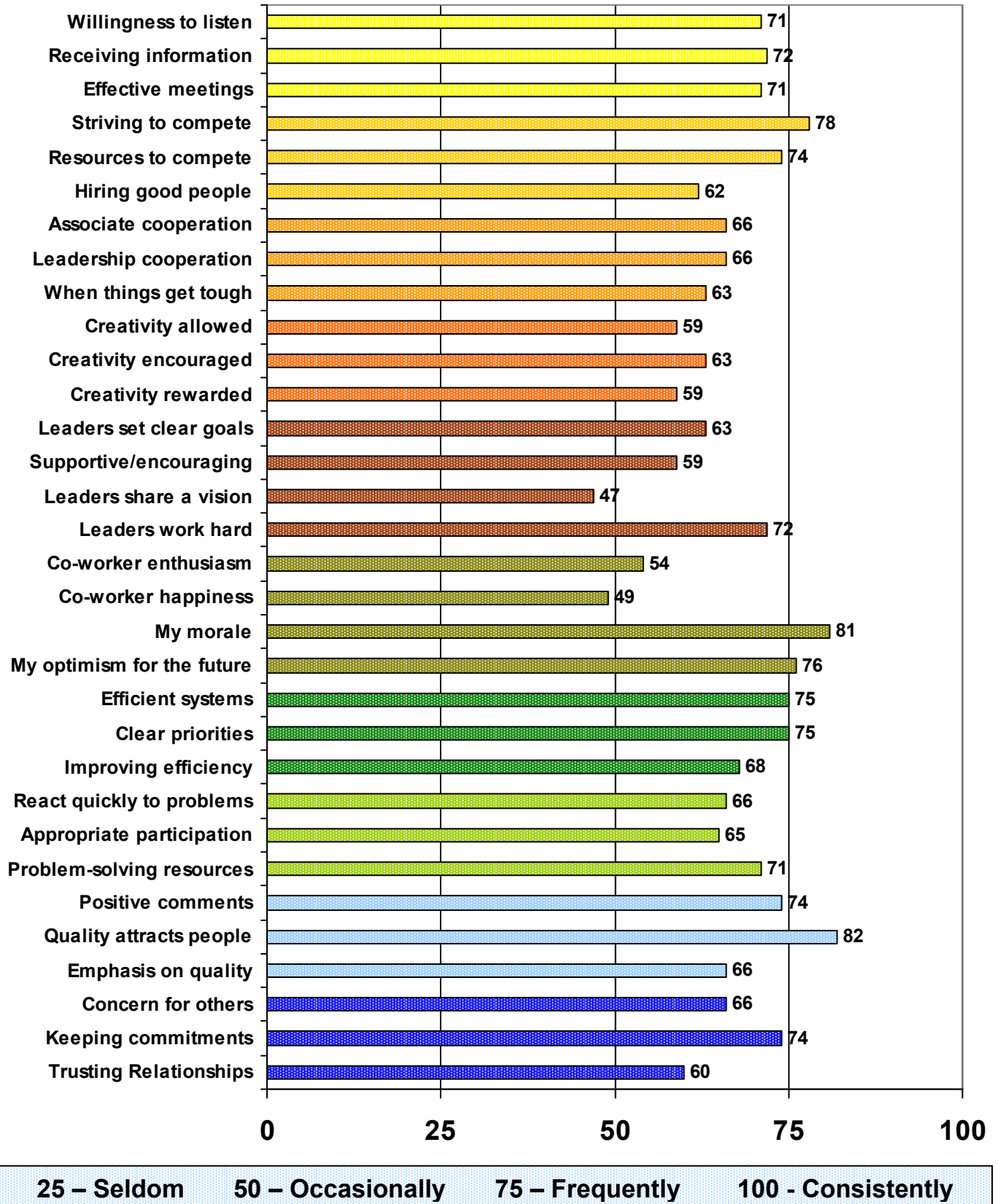
50 – Occasionally

75 – Frequently

100 - Consistently

PERCEPTION PROFILE

How often people in the company see signs of effectiveness



KEY STRENGTHS

Some of the most prominent strengths or assets people see in the company

Page number/Comment number

REPUTATION

- 8/1 Honest, fair and well thought of by community and industry
- 8/2 A long standing reliable agency
- 8/3 Past reputation was favorable with respect to accuracy and expedient service to clients
- 8/8 They appear to be well known in the industry
- 8/12 We have always been known as professionals & highly recommended
- 8/13 Well known in the region for many years
- 8/14 Through the guidance of the founder, I believe the agency built a reputation of being honest, with a strong drive for great customer service.
- 8/16 a reputable company
- 9/13 Well known in community

INTEGRITY

- 8/1 Honest, fair
- 8/2 A long standing reliable company
- 8/5 Doing things the right way
- 8/9 Strong, honest, dependable
- 8/10 dependable, loyal
- 8/12 We have always been known as professionals
- 8/13 Trustworthy, helpful, and dependable
- 8/14 I believe the company built a reputation of being honest
- 9/13 Trustworthy, helpful, and dependable

EXPERIENCE

- 8/2 A long standing reliable organization
- 8/4 has been around a long time
- 8/7 knowledgeable employees
- 8/8 well known in the industry
- 9/4 Experience
- 9/5 experienced personnel
- 9/7 Been in business over 40 years
- 9/14 We have some very knowledgeable Reps and Account Managers with many years of experience

PEOPLE

- 8/7 A staff of knowledgeable employees
- 9/2 Always a person (not an automated system) answering the phone
- 9/5 experienced personnel
- 9/9 It's staff
- 9/10 Hardworking employees
- 9/12 The friendliness of the staff to the customers. Staff members are willing to help each other on a daily basis.
- 9/17 Staff

CUSTOMER SERVICE

- 8/3 expedient service to clients
- 8/7 In the past was known for friendly, fast dependable service to clients
- 8/10 client and service oriented
- 8/12 Our customers seem to be pleased with our work
- 8/13 helpful
- 8/14 a strong drive for great customer service
- 9/1 Shared desire to do the best for the clients
- 9/3 For the client
- 9/10 willingness to go above & beyond for clients
- 9/16 Customer service

COMPETITIVENESS

- 8/10 competitive
- 8/12 highly recommended in the business
- 9/3 availability of several markets to choose from
- 9/4 known by a lot of contractors
- 9/5 A lot of good markets
- 9/8 Many markets to choose from
- 9/9 it's desire for more
- 18/10 Very competitive and able to provide better service and coverage
- 18/11 We offer far better, less expensive service
- 18/13 Great adaptability in keeping up with any competition

CURRENT ISSUES

Some of the specific issues and concerns expressed by members of the company

MORALE

- 10/4 Most employees are unhappy and under stress, they seem to not like being here
- 10/6 Staff morale
- 10/9 Lack of uniform positive attitude
- 11/1 improve morale - reduce complaining
- 11/2 Attitude and mood around the office
- 11/5 Improve morale
- 11/12 Low morale
- 14/5 Create more of a family atmosphere, make staff know they are appreciated
- 14/8 More signs of appreciation and/or company functions
- 14/13 Make it a work environment that employees look forward to coming to every day
- 17/14 Let me do my job without worrying about being the next one to be fired/let go. It has caused a lot of stress for me and my coworkers.

WORKLOAD / WORKFLOW

- 10/10 Excessive workload for Account Managers
- 11/3 Provide a support staff to handle processing of change requests, certificates, mailing and correspondence.
- 11/4 change systems to make work flow better, eliminate unnecessary work processes
- 11/10 Set times 2 or 3 days out of each week for Account Managers to do processing of renewals
- 11/12 A better appreciation for the staff & the amount of work dealt with on a daily basis
- 11/16 improved work flow
- 11/17 Faster quoting and quicker service
- 14/9 Everyone should have a good work load, but not be overworked
- 14/10 Reduce stress and work levels
- 14/11 More staff in administration
- 15/4 Work flow of each employee needs to be controlled and made more effective
- 15/9 I think we are getting closer to being able to help each other with overflow
- 15/14 If the agents only want to bring in the business and let Account Managers handle everything, we need to hire more Account Managers.
- 16/15 Timetable of quotes to Reps
- 17/4 Streamline work flow so more work can be completed in a timely manner
- 17/12 support staff for commercial to handle the address changes, endorsement processing, etc.
- 17/15 Streamline work flow

MANAGEMENT / LEADERSHIP

- 10/6 Lack of positive management
- 11/4 Change how people are managed
- 11/7 Recognition of accomplishments and service of employees by owners and management
- 11/8 Management style, lack of solid leadership
- 14/4 Change management approach
- 14/12 Respect for the work done by staff members
- 14/13 More respect for employees
- 14/14 A change in management style and attitude
- 14/17 Talk more frequently to staff
- 17/14 I don't feel like upper management really cares about their employees

COOPERATION

- 10/1 Internal struggle between old and new, resistance to change
- 10/2 Slow response in providing new business proposals
- 10/16 Not following through in a timely manor
- 11/12 Less division between the agents & staff
- 11/13 work better as a team
- 14/13 being more friendly, pleasant, cooperative and appreciative
- 14/15 Working together within our departments to problem solve
- 15/1 obtain cooperation
- 15/8 better team work
- 15/12 Respect for the time of all staff members from the agents, owners, management and staff
- 17/5 Improve team spirit

COMMUNICATION

- 10/12 Lack of communication between management & staff
- 10/13 communication
- 11/7 Better communication between staff and management about expectations and problems
- 11/8 lack of communication
- 11/12 Sincere, genuine and open communication
- 11/14 open lines of communication with upper management regarding issues or problems
- 11/15 More communication of carrier appointments on our calendar
- 12/3 A one-on-one meeting on a regular basis with principals would benefit everyone
- 12/8 Some staff members feel they can not express their concerns without consequences
- 12/12 Open communication is hindered by the fear of retaliation or termination
- 12/14 If we do say something, it seems that it just falls on deaf ears
- 14/3 Provide more oppportunity to openly discuss concerns
- 15/6 More "round table" meetings where ALL staff can participate

How would you describe the reputation of the company?

1. Honest, fair and well thought of by community and industry
2. A long standing reliable agency catering to the construction industry. Most customers believe that we only offer commercial products.
3. Past reputation was favorable with respect to accuracy and expedient service to clients. Current reputation is likely confusion due to multiple changes in staff.
4. Solid, has been around a long time, not real well known
5. Doing things the right way,
6. Not what it used to be. On a scale of 1-10, we're probably a 4. Specific actions of management have tarnished the reputation that we once had.
7. In the past was known for friendly, fast dependable service to clients for multi lines of insurance with a staff of knowledgeable employees.
8. They appear to be well known in the industry
9. Strong, honest, dependable
10. Helpful, competitive, client and service oriented, dependable, loyal
- 11.
12. I guess it depends on who you talk to. Our customers seem to be pleased with our work. Company reps & outsiders have asked, in recent months, why the turnover, are we going out of business, what is the problem here? We have always been known as professionals & highly recommended in the construction business, but, even there, I have heard concern over the agency's future. Hopefully we still maintain a good reputation in the industry.
13. Well known in the region for many years. Trustworthy, helpful, and dependable.
14. Through the guidance of the founder, I believe the agency built a reputation of being honest, with a strong drive for great customer service.
15. Great
16. Very good, a reputable company
17. Good, great

What are the company's most favorable traits at the present time?

1. Shared desire to do the best for the clients
2. Always a person (not an automated system) answering the phone.
3. For the client - availability of several markets to choose from.
4. Experience, known by a lot of contractors
5. A lot of good markets, experienced personnel, a kitchen
6. Mr. Hamilton still being involved in operations. Technology.
7. Been in business over 40 years
8. Many markets to choose from
9. It's staff and it's desire for more.
10. Hardworking employees, great teamwork, willingness to go above & beyond for clients (new & existing)
- 11.
12. The friendliness of the staff to the customers. Staff members are willing to help each other on a daily basis.
13. Well known in community. Trustworthy, helpful, and dependable.
14. We have some very knowledgeable Agents and Account Managers with many years of experience.
15. Multi carriers for all lines of business
16. Customer service
17. Staff

What are the company's most unfavorable traits at present?

1. Internal struggle between old and new, resistance to change
2. Slow response in providing new business proposals.
3. Too much employee turn-over creating confusion for clients who are calling or emailing.
4. Most employees are unhappy and under stress, they seem to not like being here
5. Disorganization, uncertainty, bad market, bad economic issues have affected our main niche market
6. Turnover. Lack of experienced staff. Staff morale. Lack of positive management.
7. Constant surprise changes and lack of communication
8. High CSR turn rate
9. Lack of uniform positive attitude.
10. Excessive workload for Account Managers
- 11.
12. Lack of communication between management & staff. Changes are made to the staff's daily operations without much input from the individual workers involved. Uncertainty in your future. Job scared. Feels like an orphanage instead of a work family. Low morale.
13. Employee turnover, communication, respect for fellow workers
14. We have some Account Managers who have very little experience.
15. Uncertain of any
16. Not following through in a timely manor
17. Lack of knowledge

If you could make any changes in the company, what would you do differently?

1. Have company standards that would have to be met by all in order to retain their positions - improve morale - reduce complaining
2. Attitude and mood around the office.
3. Provide a support staff to handle processing of change requests, certificates, mailing and correspondence.
4. Change how people are managed and change systems to make work flow better, eliminate unnecessary work processes
5. Improve morale
6. Change management.
7. Better communication between staff and management about expectations and problems. Recognition of accomplishments, growth, and service of employees by owners and management.
8. Management style, lack of communication, lack of solid leadership
9. Everything appears to be moving in a good direction.
10. Set times 2 or 3 days out of each week for Account Managers to do processing of renewals, endorsements and audits with no interruptions.
- 11.
12. Sincere, genuine and open communication. A better appreciation for the staff & the amount of work dealt with on a daily basis. Discussions about changes before implemented. Less division between the agents & staff. Respect for the staff, their time, the work done, not just complaints about what is not done.
13. Treat all employees with respect, work better as a team, management style
14. It seems we are losing our standard of honesty, especially with the companies we deal with. We need to get rid of the attitudes when dealing with the companies. I would want management to treat each and every employee fairly and with honesty, encouraging open lines of communication with upper management regarding issues or problems that occur in the office.
15. More communication of carrier appointments on our calendar, so when we have any marketing issue, we can hold it and know when the carrier will be in the agency so we can discuss it with them face to face.
16. Quicker customer response, improved work flow
17. Faster underwriting quoting and quicker service. On my part at my age, I am not educated on the computer.

What does the company do to encourage open communication?

1. Open door to all management at all times
2. Monthly staff meetings, and all employees are told that they can always talk with management and owners if they have any issues.
3. Monthly staff meetings are the only opportunity to openly communicate concerns; however, a one-on-one meeting on a regular basis with principals would benefit everyone.
4. Nothing
5. Monthly sales and staff meetings
6. Nothing. Just the opposite.
7. Unknown
8. Some staff members feel they can not express their concerns without consequences.
9. Have open communication.
10. Monthly meetings with all Account Managers to voice their opinions on changes with carriers, within the agency and procedures; open door policy for new ideas or suggestions
11. Connie is always looking after me and making sure my questions are answered, Joe, Chris and Connie are very friendly. I have often been told to come to talk to Connie if I need anything.
12. Open communication is hindered by the fear of retaliation or termination. Complaints seem to be discarded and staff is told to get over it, deal with it, and just do what you are told or be written up, like we are in elementary school.
13. Staff meetings. If you have ideas to help better a task your opinion is asked.
14. Nothing that I know of. If we do say something, it seems that it just falls on deaf ears.
15. Staff meetings, email, mini-meetings
16. Not sure, we are small and close, communication is not a problem, however willingness to listen could be
17. We have no problem in this area. We have very open communication

How much freedom do you have to be creative and try new ideas?

1. Freedom to present them and freedom to continue to pursue - not every idea is ripe when first noticed on the tree
2. As much as I ask for.
3. Pertaining to providing or marketing coverage for clients: little if any.
4. Some
5. Tons of freedom
6. Some, not much. Everything seems to be defined by technology and the internet.
7. Not much - no opportunity to express, and in the past when we have given ideas, they were not acknowledged even though some were implemented.
8. Little
9. Total
10. About 90%, but I do want my coworkers' and supervisor's opinions and suggestions on those ideas
11. Quite a bit I imagine
12. 50% as long as management likes your idea.
13. Some freedom. Depends on the task at hand. Some tasks can be carried out how you see fit. Other tasks need to follow protocol.
14. I have never tried this, so I guess I would have to say n/a
15. A good amount
16. All I want
17. As president, I expect my staff to come forward with new ideas.

What actions, if any, should be taken to improve morale?

1. Complaining only acceptable when accompanied by possible resolutions, bad attitude, talking back, or under their breath, non-cooperation or hostility written up; more team building rewards, e.g. Portion of income tied to performance and benchmarked so that each person understands the math that goes into the formula.
2. Down time occasionally to allow staff to get to know each other on a more personal level.
3. Provide more opportunity to openly discuss concerns with work volume, time-constraints, and management's expectations for accomplishing tasks.
4. Change management approach
5. Create more of a family atmosphere, make staff know they are appreciated
6. Have a person in management with "people" skills.
7. Review different types of management styles and adjust to a less confrontational style
8. More signs of appreciation and/or company functions other than a yearly event
9. Everyone should have a good work load, but not be overworked. It appears that has already been noticed.
10. Setting times each week for Account Managers to process renewal policies, endorsements and audits to reduce stress and work levels
11. More staff in personal lines to help with life and health specifically
12. Respect for the work done by staff members, appreciation for the time spent to feed the computer, deal with customers that call or walk in, the time needed to get quotes done with the various carriers, feed the computer (again). Some assurance of continued employment. Respect for the input and knowledge of the staff.
13. Incentives for doing a job well done. More respect for employees. Make it a work environment that employees look forward to coming to every day by being more friendly, pleasant, cooperative and appreciative.
14. A change in management style and attitude. We need a manager who will let us do our job, not one who tells us to do things we know are not right or won't work, thereby wasting our time. We need a manager who is consistent with answers to our questions. I would like to see upper management take control of the agency instead of giving the majority of the control to the Office Manager.
15. Working together within our departments to problem solve - maybe each department should have a mini-meeting once a quarter - collectively with one another
16. Not sure, its hard to improve morale when people do not accept change
17. Talk more frequently to staff

In what areas do you feel the need for more cooperation?

1. There is still a facet in the support staff that are resistant and complaining, no matter what the conversation or circumstances. No time to manage their workflow or learn a technique to make work easier, as they are too busy talking about how busy they are. So, short answer, obtain cooperation from those people.
2. Account Managers should take the lead in the minor issues that come up, such as confirming address changes, etc. Account Managers spend more time asking the producers what to do, on the small things, than it would take to simply pick up the phone and call the customer.
3. Producers need to gather all pertinent information before asking for a quote. Producers should follow up with clients throughout the process of writing new business, as well as renewals. Producers should take the time to look at the policies they are selling, to answer questions from the client, rather than stop the CSR from doing other work to read a policy for them.
4. Work flow of each employee needs to be controlled and made more effective
5. All areas
6. More "round table" meetings where ALL staff can participate.
7. Listen to the employees and give them an opportunity to express needs freely
8. better team work
9. I think we are getting closer to being able to help each other with overflow.
10. NONE
- 11.
12. Genuine communication. Respect for the time of all staff members from the agents, owners, management and staff members. The assurance that any information provided in this survey will not be used against the staff members in the future.
13. Make sure everyone knows set protocols, and when protocols change make sure that everyone knows the change and understands the change.
14. Agents need to do their job and stop asking Account Managers to do it for them. A small/medium size agency like ours has to be a team operation. If the agents only want to bring in the business and let Account Managers handle everything, we need to hire more Account Managers.
15. Timetable of quotes to agents, with an understanding of day to day requests from existing clients
16. acceptance of change
17. NA

How could the company help you be more effective?

1. They listen to my proposals, concerns, and visions of the future. Generally support my positions on agency protocol. Actually, Hamilton Systems is good environment in which to work. Possibly bestow Reps with a title of some kind to impress the company people, particularly when we are contracting with a new carrier.
2. Resolve issues with Account Managers' efficiency. Some staff members continue to believe that a quote should be given with the highest possible price option and explain to the customer that it could end up lower. It's just a process of placing a price tag on a quote instead of trying to write the business.
3. Define the Producer's responsibilities to them more often and stringently enforce these responsibilities.
4. Streamline work flow so more work can be completed in a timely manner
5. Improve team spirit
6. Allow me to sell product as opposed to being tied to a computer doing Service Rep work.
7. Faster computer speed and better screens for looking at more items without going back and forth
8. More thorough training, better communication from management
9. I think everyone is doing everything they can.
10. More training on AMS system, and set designated times each week for processing
11. A new desktop scanner
12. Respect for quiet time, less micro-management, support staff for commercial to handle the address changes, endorsement processing, etc. This was started and abruptly stopped when staff decreases started. Correct and accurate information provided by management the first time.
13. Better communicate what is expected instead of expect what is not communicated.
14. Let me do my job without worrying about being the next one to be fired/let go. It has caused a lot of stress for me and my coworkers. I will also add, I don't feel that the results of this survey will make any changes in this office. I don't feel like upper management really cares about their employees. I also feel that, in being honest, I will probably lose my job.
15. Streamline work flow - limit number of times something is touched. (example – quotes, collect all necessary information)
16. I sell insurance, its hard to sell when we do not have pricing, customers want pricing quickly, when I cannot deliver it in a timely way, it impacts sales.
17. Not necessary

How does the company measure-up to the competition?

1. Excellent reputation among other agencies, one of the top three midsize agencies in the area
2. Average
3. Poorly - not enough support staff to accomplish all that is necessary in the small time frame allowed.
4. Not sure about that, but we should be the competition and people should be trying to measure up to what we do - I would doubt that other agencies would be in as stressful a situation as this agency appears to be.
5. Favorably
6. Beginning to be just another generic agency
7. On the decline
8. Well
9. I believe very well.
10. Very competitive and able to provide better service and coverage to our new & existing clients than our competition
11. We offer far better, less expensive service, and we don't say no to people.
12. I am sure there are better and worse places to work. Marketing wise, I think we are competitive.
13. Great adaptability in keeping up with any competition and retaining a loyal clientele
14. I think we do well in most areas of our business. We just need a more knowledgeable staff.
15. Work hours & benefits
16. Equal
17. Small companies 100% - Large companies 50%