

Operations Training Professionalism

Purpose: Define and clarify how service and operations staff can increase their level of professionalism. Overall objective is to provide awareness of how to provide the type of professional service that is desired by your clients and fellow staff members.

Preparation: None

Facilitator: Begin the session by stating the name and purpose of the session. Review the following information in a large group format. Read the following statement and ask for the group to give their thoughts:

LARGE GROUP

PROFESSIONALISM Defined: The skill, good judgment, and polite behavior that is expected from a person who is trained to do a job well.

PROFESSIONALISM Attributes:

- Courtesy – How does this fit the definition?
- Honesty – How does this fit the definition?
- Responsibility – How does this fit the definition?
- Excellence (initiative – surprising your client) – How does this fit the definition?

Facilitator: Express to the group that “Based on the feedback we just gave about the examples of professionalism, PROFESSIONALISM IS SUBJECTIVE!”. So, let’s get in small groups and see if we can get more objective on how we will define professionalism at our company.

SMALL GROUP

Break into small groups of 3-4 people. Give them the following exercises to complete.

1. Describe a memorable time that you were treated professionally. Give specific details.
 - a. Type of business
 - b. Type of transaction
 - c. What did you appreciate or continue to appreciate?
2. List tactical ways and describe how you/we can display the attributes of professionalism clarity
 - a. Physical Appearance
 - b. Client Communications
 - c. Internal Communication
 - d. Carrier Relationships
 - e. Decision Making
 - f. Language

FACILITATOR READ THE FOLLOWING:

A Professional is someone who gets paid for what they do. Think about the work you do. Think about the way you do your work. Think about what the client receives from you. In all those areas, what attributes are worth the compensation you receive? What would make **you** worth more money?

Many times we think about professionals as “athletes”, “actors”, “musicians”. This is because they have the name Professional in front of their job description (eg Professional football player). It is also used to describe them as the best in the world at what they do. An amateur does the same job, but doesn’t get paid (so to speak...).

What if we put professional in front of our job description? Professional Account Manager. Professional Receptionist? Professional Risk Advisor? Professional Insurance Consultant? These titles would suggest we are the best of the best in that field.

However, just like athletes, actors, musicians, we would be judged by that title in every moment of our performance. The people in those jobs have absolute clarity of how the world measures them. Perfection! Well practiced. Sharp. Fit the image. Do things that wow those that “don’t get paid”.

Our challenge is to be professionals that set ourselves apart from the rest of the people who do what we do. Look for perfection, to show yourself as sharp, well practiced, fitting the image, and worthy of getting paid for what you do.

GOING FURTHER:

- BE A PRO
- Challenge your group to identify ways they are a PRO and/or raised their PRO game and give examples at the next training.