New Insurance Agency Employee Checklist

30 • 60 • 90 Days

Employee Name: ______________________________ **Position:** ____________________

Manager: ____________________________________ **Start Date:** __________________

First 30 Days – Orientation & Foundation

Completed	Task	Notes
☐	Complete HR onboarding and employment paperwork and employee manual.	
☐	Review agency mission, values, and service philosophy.	
☐	Set up all technology including: email, phone system, agency management system access and any other needed technology.	
☐	Learn agency workflows and procedures.	
☐	Meet team members and understand their roles.	
☐	Shadow experienced agents on calls or meetings.	
☐	Begin reviewing sample policies to become familiar	

	with their content and structure.	
☐	Complete Business Communication Skills courses	
☐	Learn documentation standards and E&O prevention practices.	
☐	Review carrier portals and navigation.	
☐	Learn new insurance terminology.	
☐	Schedule regular check-ins with manager.	
☐	Complete assigned training courses.	

Days 31–60 – Skill Development & Application

Completed	Task	Notes
☐	Begin handling basic customer service tasks.	
☐	Practice quoting policies with supervision.	
☐	Review policy forms and coverage options.	
☐	Learn how to process endorsements and policy changes.	
☐	Learn renewal workflows.	
☐	Communicate with carriers for basic service needs.	
☐	Document all client interactions properly.	
☐	Handle basic client questions.	
☐	Continue training courses and certifications.	
☐	Participate in team meetings.	
☐	Receive feedback and coaching from manager.	

Days 61–90 – Independence & Performance

Completed	Task	Notes
☐	Handle client service tasks independently.	
☐	Quote and explain coverages confidently.	
☐	Identify coverage gaps and recommend solutions.	
☐	Manage assigned accounts or tasks.	
☐	Demonstrate proper documentation standards.	
☐	Build relationships with carriers.	
☐	Demonstrate understanding of agency workflows.	
☐	Meet performance expectations for role.	
☐	Complete all required training.	
☐	Set professional development goals.	
☐	Complete 90-day performance review with manager.	