



Core Values in a Remote Insurance Agency



Core values define your agency's culture, guide decision-making, and foster alignment and trust among owners, managers, and team members, strengthening communication and collaboration. They also set the standard for client and employee interactions. These values need to be authentic, with clear and concise language, so they are easily understood and embraced by everyone...this means keep them simple!

Use this worksheet to identify and articulate the core values that will shape your agency's future.

Step 1: Reflect on Your Agency's Purpose

Why does your agency exist?

What is the primary mission or goal of your agency?

What makes your agency unique in the market?

What are your long-term goals/where are you wanting to go?

How do you envision your agency evolving in the next 5-10 years?

What impact do you want to have on your clients and the industry?



Step 2: Identify Key Principles Consider some of the following categories to help brainstorm your core values:

Empathy & Support: How do you want your team to interact with clients? How do you want your team to interact with each other?

Team Culture: What kind of work environment do you want to establish?

Consistency & Alignment: How do you want your agency to run and operate on a daily basis?

Performance and Growth: How do you promote consistent growth and improvement?

Community and Impact: What role does your agency play in the broader community?

List potential values:

1.

2.

3.

4.

5.

6.

7.

8.



Step 3: Narrow Down Your Values

Prioritize: From the list above, choose 3-5 values that are most critical to your agency's identity.

1. _____
2. _____
3. _____
4. _____
5. _____

Test them: Do these values resonate with you and your team? Do they align with your agency's mission and vision? Remember, your team will change, so YOU need to be on board with these values as well.

Your core values should serve as the foundation for every action within your agency, guiding all decisions. Regularly revisit and refine them to ensure they stay aligned with your agency's evolving goals and culture.