

Important Course Information

Each course in this series:

- Contains audio and graphics
- Tests understanding with quizzes and Knowledge Checks
- Integrates with your organization's existing Learning Management System (LMS)
- Earns a certificate of completion (upon successfully finishing the requirements)

Courses may be accessed for 90 days from date of purchase.

About The Institutes

The Institutes are the leader in delivering proven knowledge solutions that drive powerful business results for the risk management and property-casualty insurance industry.

The Institutes' knowledge solutions include the CPCU designation program; associate designation programs in areas such as claims, risk management, underwriting, and reinsurance; introductory and foundation programs; online courses; research; custom solutions; assessment tools; and continuing education (CE) courses for licensed insurance professionals and adjusters through its CEU.com business unit.

About The Council

The Council of Insurance Agents & Brokers is the premier association for the top national, regional and international commercial brokerage firms and agencies in the United States and around the world. Council members annually place nearly 90 percent of all commercial property/casualty premiums in the United States, more than \$200 billion in commercial p/c and employee benefits premiums worldwide. Nearly 20 percent of the membership is comprised of firms headquartered outside the United States. Founded in 1913, The Council is based in Washington, D.C.



▶ Essential Business Skills
for the Insurance Professional



The Business Problem

Insurance professionals like you know an organization can achieve its strategic goals more efficiently and effectively with a knowledgeable staff. So, when The Council of Insurance Agents & Brokers (The Council) asked member CEOs what kept them awake at night, it came as no surprise that the recurring theme was “talent.”

The Knowledge Solution

Essential Business Skills for the Insurance Professional is a series of six self-study online courses designed for those new to the insurance brokerage industry or those who want to refresh existing skills. Each course features original content developed by Council member firms and The Institutes to help agencies and brokerages:

- Gain practical selling skills to turn prospects into customers
- Develop business-related interpersonal skills to increase customer satisfaction and retention
- Establish a common business framework that will enhance overall productivity and operational efficiency
- Acclimate employees to the agent-broker environment
- Reduce lost time and productivity costs with flexible online delivery
- Provide a critical professional starting point to help attract and retain talent

This cost-effective program consists of the following six online self-study courses:

1. Overview of the Insurance Industry (1 Hour, \$16)

- The Business of Insurance
- The Management of Risk
- The Role of the Commercial Agent and Broker
- Government Regulation and The Insurance Industry
- The Future of The Insurance Industry

2. Fundamental Business Skills (1 Hour, \$16)

- Effective Interpersonal Skills for Professionals
- Basic Finance Skills
- Business Etiquette
- Social Etiquette for Business Events
- Emotional Intelligence
- Teamwork
- Time Management

3. Building Client Relationships (1 Hour, \$16)

- Building Successful Client Relationships
- Projecting a Helpful Attitude
- Managing the Project (How to Get Things Done)
- Client Process Management
- Identifying Client Needs for Service Professionals
- Handling Difficult Clients

4. Consultative Selling (2 Hours, \$32)

- Client Prospecting - How, Where, What and What Next?
- Client Prospecting - The Dynamics of Buying Decisions
- Identifying Client Needs for Sales Professionals
- Problem Solving and Resolution
- Successful Negotiation
- Closing

5. Management Training (2 Hours, \$32)

- Managing to Organizational Expectations
- Employment Law Overview
- Successful Interviewing
- Performance Management
- Coaching
- Career Management
- Counseling a Problem Employee
- Project Management

6. Follow-Up Coaching (1 Hour, \$16)

- Managing to Organizational Expectations
- Performance Management
- Coaching
- Applying Coaching and Facilitation Skills

Package Pricing

Purchase all six courses for only \$90 (a savings of nearly 30%)

Developed in conjunction with and endorsed by