

Introduction to the Insurance Industry

- **Introduction to the Insurance Industry:** This learning module reviews essential insurance terms, definitions and categories of insurance and describes the core functions of an insurance carrier.
- **Introduction to Property & Casualty Insurance:** This learning module provides a detailed introduction to the Property-Casualty insurance business.
- **Introduction to Insurance Distribution Channels:** This learning module reviews the types of insurance carriers and distribution entities in the Property-Casualty industry. Insurance agency roles are also summarized, including the importance of compliance.
- **Introduction to Risk Management:** covers the complete risk management function including risk assessment, risk management objectives and risk management planning and measurement.
- **Introduction to Errors & Omissions:** The Introduction to Errors & Omissions learning module teaches the user about important information, insurance regulations, licensing and authority. The user will also explore the fiduciary duties of an insurance agency.

Customer Management Skills

- **Introduction to Relationship Management:** The Introduction to Relationship Management learning module introduces the learner to the four communication styles. The learner will identify their own communication style and learn techniques for communicating with others such as clients, team members, managers and carrier underwriters.
- **Building Trust and Managing Conflict:** The Building Trust and Managing Conflict learning module helps the learner review the four communication styles often used and discussed in relationship management. The module also demonstrates for the user how to build trust with clients. A section on managing conflict provides ready to use tips.

Business Communication Fundamentals

- **Verbal Communication Skills – Effective Communication:** The Verbal Communication Skills: Effective Communication learning module helps the learner to discover how to communicate eloquently in person and on the phone using examples and sample calls. The user will understand proper greeting, hold and transfer and closing protocol, as well as how to create impactful first impressions by using tone, body language and word choice to their advantage. The learner will also receive helpful tips about effective listening.
- **Verbal Communication Skills – Building Rapport:** The Verbal Communication Skills: Building Rapport learning module helps the learner to uncover the definition of rapport while infusing the importance of making a good first impression. The user will acquire a step-by-step process of rapport building and view samples of good rapport building techniques.
- **Business Writing 101:** The Business Writing 101 learning module creates an overview of core business writing principles. The module reviews sentence structure, punctuation and grammar tips. Examples of correspondence often used within insurance agencies are included. The power and impact of word choice on the reader's perception is covered within this module.
- **Personal Time Management:** In the Personal Time Management module, you will identify time wasters and tips for setting priorities, understand what items rob you of your time each day and how to solve these issues, deploy techniques to avoid interruptions, understand how to say no positively and how to balance your client demands and deadlines, and finally, you will create a personal action plan for improving your time management skills.