NEW LEVEL PARTNERS

New Level Partners Online Course and Workshop Catalog

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Q4 2022

About New Level Partners

As New Level Partners (NLP) celebrates its 20 years specializing in training solutions for the Property and Casualty Insurance Industry, we share our wide range of insurance industry learning solutions as your company looks ahead to your 2023 learning strategy.

New Level's learning elements are designed to expand and accelerate the reach and productivity of your firm's learning strategy. We offer a variety of solutions: online, virtual campuses, in-person, workshop content, etc. We can help you build from scratch, partially tailor/brand or simply plug-play our courses immediately.

Custom Design – Your Very Own:

NLP designs, develops and delivers customized and interactive training programs, both instructor-led and web-based. A wide range of instructional design tools and technologies ensure NLP's programs are the most interactive and effective on the market.

Use our Technology and Expertise:

The NLP team delivers strong educational-technology expertise, creativity and proven instructional design to every project. We have deep experience in the property and casualty insurance industry in a wide range of roles including leadership, underwriting, agency sales, service, operations, human resources and training. Our secret ingredient for success is our proficiency as instructional designers. NLP's extensive insurance background translates to efficient collaboration with industry subject-experts and specialists.

Upload and Run NLP Content:

NLP offers a flexible portfolio of options such as custom development of courses, licensing of NLP on-line courses for your LMS, workshop content delivered by NLP or by you, branded virtual campus curriculum for multi-month programs and on-site programs.

We value our role as your Learning Partner and look forward to working with you in 2021!

The NLP Team!

Online Courses

Virtual Campus Curriculum

Game-Based Learning

Virtual Workshops

Education Consulting Services

Online Courses

New Level Partners online learning courses are designed with narration, interactive elements, knowledge checks, assessments and flexible navigation for the learner to control their path. The courses are available for licensing on your own Learning Management System or to purchase in small bundles through our www.myagencycampus.com.

General Insurance Topics

Introduction to the Insurance Industry

1. **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.

2. **Introduction to Property & Casualty Insurance:** This learning module provides a detailed introduction to the Property-Casualty insurance business.

3. **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.

4. **Introduction to Risk Management:** covers the complete risk management function including risk assessment, risk management objectives and risk management planning and measurement.

5. **Introduction to Risk Transfer and Policy Design** deconstructs the key elements of P&C insurance contracts, clarifying fundamental policy intent and facilitating cross-policy comparisons.

6. **Introduction to Underwriting and Pricing Principles:** This learning module will give you a foundational understanding of carrier underwriting strategy and the dynamics of carrier profit models. You will learn how rates and pricing models are developed and how advanced predictive analytics are changing carrier's ability to select risks and improve the profit potential of their book of business. With the new knowledge and perspectives acquired in this module, your ability to understand competitive market pricing and advise high-net worth clients will advance.

7. **Introduction to C.O.P.E.** describes the importance of interdisciplinary analysis of Construction, Occupancy, Protection and Exposure to the property risk management and insurance process – underwriting, pricing and placement.

Our partnership with New Level has been a great success. New Level's catalogue of online, on-demand courses makes it easier than ever to onboard staff new to the industry.

Commercial Lines Coverage Basics^{TM}

Commercial Lines – Property

8. **Introduction to Property Insurance: Core Principles** provides a comprehensive overview of commercial property insurance. All property policy components are discussed, including causes of loss and key exclusions.

9. **Introduction to Property Insurance: Coverages** reviews the full coverage grant in the commercial property policy form, including covered locations and additional coverages.

10. **Introduction to Property Insurance: Limit Determination** discusses limit determination in the commercial property policy form, including an overview of property valuation, co-insurance and agreed value provisions. Deductibles and protective safeguards are also discussed.

11. **Introduction to Property Insurance: Risk Management** reviews property loss exposures and property insurance risk management. Types of property losses and their valuation are reviewed including the impact of revenue and expense fluctuation on net income.

12. **Introduction to Business Income** reviews the combined Business Income and Extra Expense Coverage Form.

13. **Introduction to Property Rating** provides a comprehensive overview of the process, including definitions of key property insurance terms and elements and factors involved in the property rating process.

Commercial Lines – General Liability

14. **Introduction to Casualty Insurance: Core Principles** reviews the Commercial General Liability policy including policy structure, coverage   triggers and limits of insurance.

15. **Introduction to Casualty Insurance: Coverages** reviews Coverages A, B and C including insuring agreements, triggers and exclusions. Supplementary Payments under Coverages A and B are also discussed.

16. **Introduction to Casualty Insurance: Products-Completed Operations Hazard** provides a detailed overview of the CGL policy's Products-Completed Operations coverage. The module starts with an overview of the products-completed operations liability insuring agreement and reviews definitions, exclusions, supplementary payments, limits of insurance and the claims-made extended reporting period.

17. **Introduction to Casualty Insurance: Exclusions** provides a detailed review of the CGL policy exclusions.

18. **Owners and Contractors Protective Liability** reviews OCP coverage, including comparisons with the CGL and the common uses of the policy.

Online Courses

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19. **Introduction to Additional Insured** reviews key elements of Additional Insured status under the CGL policy, including discussion of the financial interests of individuals and entities who need the protection afforded by an Additional Insured endorsement.

20. **Overview of Certificate of Insurance:** Upon completion of this course, you will be able to describe the purpose of a certificate of insurance, know why certificates of insurance are important, know how to read a certificate of insurance and understand certificate compliance, management and tracking.

Workers Compensation

21. **Introduction to Workers Compensation Insurance: Core Principles** provides an overview of Workers Compensation Law and the State regulated Workers Compensation system in the U.S.

22. **Introduction to Workers Compensation Insurance: Coverages** provides a detailed review of the Workers Compensation and Employers Liability policy sections and coverages, including types of disabilities and Other States coverage.

23. **Introduction to Workers Compensation Insurance: Classifications:** For most employers, the costs associated with Workers Compensation account for a significant portion of the firm's cost of risk. As a result, there is much to understand regarding Workers Compensation classification, rating and premium determination and risk financing options. This course provides an overview of: Exposure Base, Classification and Unmodified Premium Determination, and Premium Modification.

24. **Introduction to Workers Compensation Insurance: Risk Management** provides a comprehensive introduction to Risk Assessment and Risk Management for employee-related injury exposures.

Business Auto and Garage Coverages

25. **Introduction to Commercial Auto Insurance: Coverages** reviews the Business Auto Policy (BAP) to explain the different types of covered autos and the symbols used in the declarations. You will also understand the Auto Liability coverage grant including exclusions and the limit of insurance provision. A review of Physical Damage coverage including physical damage exclusions, limit of insurance and deductibles is also included.

26. **Introduction to Commercial Auto Insurance: Declarations, Classification and Rating** provides a detailed review of the Business Auto Declarations page, and commercial vehicle classification and rating.

27. **Introduction to Garage Coverages** reviews the purpose of the Garage policy including liability and physical damage, types of covered autos and Garagekeepers coverage.

Commercial Umbrella Liability

28. **Introduction to the Commercial Liability Umbrella Policy** reviews the standard Commercial Liability Umbrella policy beginning with an overview of how an Umbrella policy functions and a review of the key components of the policy including the 'Who Is Insured' provision, Coverages A & B, limits of insurance, key definitions and conditions are also reviewed.

29. **The Commercial Liability Umbrella Policy: Maintenance of Underlying Insurance** expands knowledge of the Commercial Liability Umbrella Policy and the requirement to maintain underlying limits. Underlying insurance requirements and scenarios, and drop-down provisions are also reviewed.

BOP Coverages

30. **Introduction to BOP Property Coverages** provides a comprehensive overview of Property Coverages provided by the Businessowners Policy, including discussion or target customers for BOP. The course also reviews all BOP Property Coverages, Causes of Loss, Exclusions, Limits and Deductibles.

31. **Introduction to BOP Liability Coverages** provides a comprehensive overview of Businessowners Liability coverage and insuring agreement, including Personal Injury, Advertising Injury, Medical Payments. The course also reviews Limits, the Named Insured clause, the Occurrence trigger, Supplementary Payments and Exclusions.

Specialty Coverages

32. **Introduction to Surety Bonds:** Upon completion of this course, you will gain a foundational understanding of Surety Bonds. You will be able to explain how Surety Bonds work and the different types of Surety Bonds. You will be able describe the process and responsibilities of the principal/contractor, surety producer and surety underwriter.

Commercial Lines Coverage Challenge

33. **The Commercial Lines Coverage Challenge** tests knowledge and understanding of Commercial Property, CGL, Workers Compensation, Business Auto and Umbrella coverages. Each 'Challenge' contains 25 questions randomly selected from a bank of over 100 possible questions.

Commercial Lines Covered/Not Covered Learning Games

34. **Covered/Not Covered Commercial Property** provides an interactive and engaging reinforcement of essential coverage terms and concepts through scenario-based learning relating to Commercial Property Coverage.

35. **Covered/Not Covered Commercial General Liability** provides an interactive and engaging reinforcement of essential coverage terms and concepts through scenario-based learning relating to Commercial General Liability Coverage.

36. **Covered/Not Covered Commercial General Liability – Products and Completed Operations** provides an interactive and engaging reinforcement of essential coverage terms and concepts through scenario-based learning relating to Commercial General Liability: Products and Completed Operations.

37. **Covered/Not Covered Commercial Auto and Umbrella** provides an interactive and engaging reinforcement of essential coverage terms and concepts through scenario-based learning relating to Commercial Auto Coverage and Commercial Umbrella Coverage.

38. **Covered/Not Covered Workers Compensation** provides an interactive and engaging reinforcement of essential coverage terms and concepts through scenario-based learning relating to Workers Compensation Coverage.

39. **Covered/Not Covered Commercial Business Income** provides an interactive and engaging reinforcement of essential coverage terms and concepts through scenario-based learning relating to Commercial Business Income Coverage.

40. **Essential Terms and Key Concepts 1** provides an interactive and engaging reinforcement of essential coverage terms and concepts through scenario-based learning.

41. **Essential Terms and Key Concepts 2** provides an interactive and engaging reinforcement of essential coverage terms and concepts through scenario-based learning.

Personal Lines Coverage Basics™

Homeowners Property & Liability

42. **Homeowners Property Core Principles:** This module gives the user an introduction to Homeowners Insurance, and goes into detail describing all of the aspects of the Property section of the Homeowners policy.

43. **Homeowners Liability Core Principles:** This module includes an introduction to Homeowners Liability terms and coverages, including Conditions and Exclusions.

44. **Insurance to Value:** This course provides an overview of home construction terminology and important concepts such as insure to value and analyzing risk. Topics include: house styles, exterior/interior construction materials and rebuild cost versus market cost.

45. **Homeowners HO-3 (ISO 1991)**: This module provides an introduction into the HO-3 Homeowners Form, and develops a firm knowledge base of the sections of the HO-3 Form including coverages, conditions and exclusions.

46. **Homeowners HO-4 (ISO 1991):** This module provides an introduction into the HO-4 Tenants Form, and develops a firm knowledge base of the sections of the HO-4 Form including coverages, conditions and exclusions.

47. **Homeowners HO-6 (ISO 1991):** This module provides an introduction into the HO-6 Unit Owner's Form, defines key terms like condo, co-op, additions and alterations, and develops a firm knowledge base of the sections of the HO-6 Form including coverages, conditions and exclusions.

48. **HO-3 ISO 2011:** The HO-3 ISO 2011 learning module provides an introduction into the HO-3 Homeowners Form, and develops a firm knowledge base of the sections of the HO-3 Form including coverages, conditions and exclusions.

49. **HO-4 ISO 2011**: The HO-4 ISO 2011 learning module provides an introduction into the HO-4 Tenants Form, and develops a firm knowledge base of the sections of the HO-4 Form including coverages, conditions and exclusions.

50. **HO-6 ISO 2011**: The HO-6 ISO 2011 learning module provides an introduction into the HO-6 Unit Owner's Form, and develops a firm knowledge base of the sections of the HO-6 Form including coverages, conditions and exclusions as well as definitions of condos, co-ops, additions and alterations.

51. **Homeowners Coverage Form Changes 2022:** This course is a condensed overview of the expected changes coming to the Homeowners ISO forms in 2022. The updated forms are filed in multiple states and are expected to be released in March 2022.

52. **Dwelling Coverage:** Dwelling Coverage begins with clarification of who would qualify for this coverage and then provides detail about the DP-1, DP-2 and DP-3 policy forms, including additional coverages and policy limits.

53. **2000 ISO Homeowners Policy Form:** The 2000 ISO Homeowners Policy Form learning module highlights the differences between the 1991 and 2000 ISO Homeowners Policy Forms. Key aspects of this module include definition changes, coverage comparisons, and an overview of perils and exclusions. Also, included within this module is a review of Homeowners insurance and reinforcement of Property and Liability Coverages and Limits.

54. **Introduction to the Personal Liability Umbrella Policy:** This module will introduce you to the ISO Personal Liability Umbrella policy. We will begin with an overview of how an Umbrella policy functions, followed by an introduction to the key components of the ISO policy including the 'who is insured' provision, the Umbrella policy's structure and coverages along with key definitions, conditions and exclusions. Finally, we will review several claims examples that will help to demonstrate the importance of having Umbrella insurance.

55. **Introduction to the Personal Articles Floater: Inland Marine Policy:** This module will provide you with an introduction to Personal Inland Marine insurance. You will learn important terminology and understand the coverages included in Personal Inland Marine insurance with a concentration on the Personal Articles Floater contract.

56. **Introduction to Personal Watercraft Insurance:** This training module will provide you with an introduction to Personal Watercraft insurance. You will learn the difference between Watercraft insurance and Personal Homeowners and Automobile insurance coverage for Watercraft. You will receive an introduction to the policy form, the coverages, features of Watercraft insurance and policy provisions.

57. **Underwriting and Potential Catastrophes:** A review of critical catastrophes that impact the personal lines insurance customer, including Earthquake, Hurricane, Flood and Wildfires. This course includes the definition of each catastrophe type, a brief review of underwriting and risk prevention recommendations.

58. **The Homeowners Personal Lines Reinforcement Game** offers a series of client events that challenge the learner's knowledge and understanding of homeowners coverages while determining the correct outcomes to various scenarios.

59. **Interior Home Construction Features**: The features and materials used in the home's interiors impact the overall appraisal value and insurance limits selected. This course will take a deep dive into the interior home elements including floors, walls, molding, doors, staircases, elevators, fireplaces, ceiling, lighting, kitchens, bathrooms, specialty rooms and home systems. The content is important for agents, underwriters and home appraisers.

60. **Exterior Home Constructions Features:** The components of exterior home construction features contribute to the overall replacement and insurance to value for the home. Agents, underwriters and home appraisers will find value in this course to gain a deeper understanding of the variables and ranges relative to the quality of building materials and home features. Topics include: roof, frame, windows, doors, foundation and additional structures.

61. **Introduction to Excess and Surplus Lines Insurance:** In this module, you will gain a basic understanding of the Excess and Surplus Lines Market. Upon completion, you will be able to define what E&S is along with key terms, the structure and regulation. You will be able to explain the impact of the market cycle on the E&S insurance market. Plus, you will be able identify the types of personal insurance risks that might be insured in the E&S insurance market segment.

62. **Admitted Versus Non-Admitted Products and Services**: In this course, you will differentiate between admitted and non-admitted products and will be able to describe features, benefits, regulations, and products and services.

Personal Auto Coverages

63. **Personal Auto Insurance:** The Personal Auto module will introduce the learner to automobile insurance including a detailed walk through the four parts of automobile coverage: Liability, Medical Payments, Uninsured Motorist Coverage and Physical Damage Coverage. Concepts such as split limits, financial responsibility and state minimum limits, no

fault and assigned risk plans are also covered.

Personal Lines Coverage Challenge

64. **The Personal Lines Coverage Challenge** tests knowledge and understanding of Personal Property and Liability and Homeowners' coverage. Each 'Challenge' contains 25 questions randomly selected from a bank of over 100 possible questions.

Employee Benefits Insurance Basics

Introduction to Employee Benefits

65. **Introduction to Insurance: Employee Benefits:** This is a foundational course where you will gain an understanding of key insurance concepts and vocabulary that will carry forward as you build knowledge in the many facets of Employee Benefits.

66. **Group Employee Benefits: Insurance Basics:** In this course, you will acquire basic knowledge of employee benefits insurance terminology and the various lines of coverage.

67. **Benefits Basics: Legal Essentials Overview:** This is an essential course for employee benefits team members to gain an understanding of specific laws and regulations along with an overview of compliance requirements.

68. **Employee Benefits Basics: The Employee Benefits Broker:** The employee benefits broker creates an impact in helping companies and their employees. In this course, you will identify the key ingredients in a proposal, and further recognize the importance of the legal essentials in employee benefits administration and care.

Healthcare

69. **Healthcare and Group Benefit Plans:** This course is the perfect first step to understanding healthcare in the US today. The learner will be able to describe why employers offer medical plans and types of healthcare coverage.

70. **Medical Plans and Concepts:** Take a deeper dive into the different types of medical plans. The learner will be able to describe the nuances of the various plans: HMO, PPO, EPO, POS, Indemnity Plan and HDHP.

71. **Affordable Care Act:** The Affordable Care Act (ACA) was signed into law in March 2010. All employee benefits team members need to have a basic understanding of what the ACA is and why it was created. Building a foundational knowledge of ACA will help you guide your clients to how it works, compliance requirements and how it needs to be communicated to employees.

72. **Understanding Plan Documents:** Upon completion of this course, you will be able to describe what a written plan document is and how this differs from a summary plan description. You will be able to identify how an employer needs to comply with the

distribution of plan information to employees. You will be able to access the Department of Labor website where all the Reporting and Disclosure Guide for Employee Benefit Plans is located.

73. **Health Savings Accounts:** Upon completion of this course, you will be able to identify how a Health Savings Account or also known as an HSA can provide financial support to individuals who have a high deductible health plan.

74. **Health Reimbursement Arrangements**: Upon completion of this course, you will be able to explain what a health reimbursement account or HRA is, the types of HRAs and reimbursements, and the legal requirements.

75. **Tax Advantage Plans**: In this course, we will be comparing the three main tax advantaged accounts used to give participants a means for saving taxes on medical expenses – Those three are: Health Savings Accounts, Flexible Spending Accounts and Health Reimbursement Accounts. We will start with a general review of each account and then dive into how each important account feature compares to each other. The main concepts for comparison include "Who Owns the Account?", rules regarding contributions and distributions, the difference between HSA rollovers and FSA rollovers and basic differences in eligibility rules between the three accounts. Finally, we'll discuss which of these accounts can actually be offered alongside the other.

76. **Prescription Drug Plans**: In this course, you will gain foundational knowledge of prescription drug plans and how they work. You will be able to describe various terms such as generic drugs, formulary drugs, the role of the pharmacy benefit manager and how prescription coverage works with Medicare.

77. **Group Healthcare Funding and Concepts:** Due to the rising costs of healthcare, many employers, small and large, seek ways to reduce or manage their overhead. In this course, you will gain the foundational knowledge of Group Health Care Funding Concepts.

78. **Insurance for Seniors and Special Needs Individuals**

79. **Wellness and Disease Management**

Ancillary Benefits – (Fall 2022)

80. **Ancillary Benefits Overview**

81. **Vision Plans**

82. **Dental Plans**

83. **Life Insurance**

84. **Long Term Care Insurance**

85. **Group Accident and Health Insurance**

86. **Disability Insurance**

Business and Customer Service Skills

Customer Management Skills

87. **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.

88. **Errors & Omissions – What Can You Do?**: This learning module reviews the definitions of errors and omissions, along with important information about who is liable and the possible consequences. A top ten list of the errors and omissions agencies experience is explained in detail. The user will explore and retain best practices in avoiding E&O exposure.

89. **Customer Management – Anticipating Needs:** The Customer Management: Anticipating Needs learning module explores the roles within the insurance agency and helps the learner to understand the new business workflow, renewal workflow and certificates of insurance process. The user will also learn how to build credibility and loyalty with co-workers and clients, how to develop a strong client retention strategy and understand how anticipating needs will aid in customer management.

90. **Customer Management – Balancing Priorities:** The Customer Management: Balancing Priorities learning module explores different time management strategies for balancing client's requests and agency demands. The learner will also develop techniques to prioritize agency duties, avoid procrastination, manage a workload and manage a workspace.

91. **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.

92. **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

93. **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.

94. **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.

95. **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.

96. **Business Writing 201:** The Business Writing 201 learning module leads the learner through a grammar review. The concept and examples of powerful opening and closing lines within correspondence is introduced. Included in this module are business writing essentials to create more powerful communication such as: concrete nouns, avoiding clichés, active voice, etc.

97. **Personal Time Management:** In this course, 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.

Advanced Communication and Negotiation

98. **Introduction to Negotiation Skills:** This course introduces the learner to an overview of negotiation techniques and the seven steps to agreement. Utilizing great information as described by Harry Mills in his book, *The Street Smart Negotiator*, the user will, after this learning module, be able to apply the tips to successfully negotiate within the insurance industry.

99. **Negotiating Steps and Building Credibility:** The Negotiation Steps and Building Credibility learning module expands on the techniques from the Introduction to Negotiation Skills module. This module targets an approach to build credibility with the other party in a negotiation.

100. **Powerful & Persuasive Communication Skills:** This course introduces the user to the impact of effective messaging on professional relationships, stressing powerful and persuasive messaging. Powerful and persuasive messaging includes the impact of perceptions and impressions. The user will also develop planning techniques for communication and negotiating.

101. **Fine Tune Your Elevator Pitch:** This course outlines 'how' to create an Elevator Pitch for your company, yourself and tailored to a specific individual. Upon completing this training, you will have the essential elements of an Elevator Pitch prepared and ready.

> *Today's agencies need new talent as our workforce shifts to a new generation of brokers and account managers. This next generation of learners prefer to have a structured yet flexible training program. The online learning provided by New Level Partners has provided an instant solution for our members.*

102. **Sales Basics – Uncovering Customer's Needs:** Making a confident, first impression requires attentiveness and understanding the client's needs – known and unknown. The course covers how to use a variety of questioning styles to uncover key information to gain a deeper understanding of the client's risk management needs.

Leading Successful Projects and Meetings

103. **Successful Project Management** provides the essential and proven seven steps for success in tackling any project from inception to implementation.

104. **Gaining Stakeholder Buy-In** outlines the steps for introducing new concepts and recommendations to stakeholders to achieve their support and/or approval for a successful implementation.

105. **Leading Productive Meetings** provides the essentials for meeting preparation, facilitation and leading meetings to achieve the expected outcomes.

Team Leader's and New Managers Series

106. **Introduction to Recruiting and Hiring:** The Introduction to Recruiting and Hiring learning module begins with current trends in the recruiting world. It then delivers a strong basis for how to determine needs, prepare for the recruiting process and discusses the best ways for recruiting talent to your firm.

107. **Recruiting and Hiring – Assessment, Interviewing, and Selection:** This module describes, in depth, different pre-employment assessments, how to decipher the analysis of these assessments, and how to conduct intelligent and effective interviewing.

108. **Employee Retention:** In this module, the manager will be able to define the cost of turnover and how it is impacting their business. This module comes with a tool kit providing the manager with tips and helpful documents for implementing a sound Employee Retention program.

109. **Human Resources Risk Management For Your Firm:** This web based training program will help you gain knowledge of Federal employment laws that have a significant impact on your business. The content in this module is extremely beneficial to leaders who are running their business operation while assuming human resources responsibilities. The chapters will cover: compliance risk management, personnel file management, safe work environment essentials and an HR audit plan for your own business to deploy.

110. **Performance Management Principles:** This web based training module provides an introduction to performance management along with recommendations for implementing a program within your business. The basics of performance management are covered along an overview of various processes, developing SMART goals for employees, and the steps for handling performance improvement. A Resource Guide for managers is provided with key points for implementation.

Online Courses

Virtual Campus Curriculum

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111. **Effective Coaching Techniques for Leaders:** This web based training module provides an introduction to the elements of leadership and management, as well as leadership competencies and the impact of coaching on business relationships. Users will proceed through a coaching style inventory to discover their coaching style, and understand the leader's role as a coach. Finally, the user will understand how to create a feedback-receptive culture.

Virtual Team Leadership Series

112. **Passport to Virtual Leadership:** Understanding the success factors for leading teams virtually is the foundation for this course. Trust, Technology and Collaboration are three critical aspects for building a remote work culture. New leaders and experience leaders will find value in this course.

113. **Passport to Virtual Leadership - Virtual Team Types:** Assess your team to identify areas to strengthen and improve for optimal performance. The course will look at four different team types based on two elements: Proximity and Dependence. This course includes an introduction to the virtual team type model.

114. **Virtual Team Type: The Endurance Cyclist**: Leading team members that have high proximity (far) from one another and low dependence on each other to get the job done.

115. **Virtual Team Type: The Trail Hiker**: Leading team members that have low proximity (close) to one another and low dependence on each other to get the job done.

116. **Virtual Team Type: The Extreme Mountaineer**: Leading teams that have high proximity (far) from one another and high dependence on each other to get the job done.

117. **Virtual Team Type: The Relay Team**: Leading teams that have low proximity (close) to one another and high dependence on each other to get the job done.

Trainer's Bootcamp Series

118. **Trainer's Bootcamp Series –** Three Courses: Ideal for new software, systems or content trainers. The Bootcamp Series includes three courses focused on Preparation, Facilitation and Challenges. The content will prepare the trainer with the fundamentals needed to deliver classroom or virtual sessions.

    a. Trainer's Bootcamp: Preparation

    b. Trainer's Bootcamp: Facilitation

    c. Trainer's Bootcamp: Challenges

> *This has been a really great growth opportunity. Everything that the course has offered has been very helpful and applicable on a day-to-day basis.*

Virtual Campus Curriculum

NLP offers extended curriculum (3-6-9 months) depending on the objectives and content. The virtual campus curriculum is mapped into a consecutive, multi-month, interactive, learning experience. NLP has the content to create a curriculum based what your team needs to achieve. You can use our content along with our instructors or blend the live instruction with your own instructors as well.

The curriculum includes the following: readings, cased, e-learning courses, live instruction, assessments, videos, etc. NLP can brand the virtual campus with your company's logo/colors. The NLP team will coordinate, host and manage the program.

Here are curriculums that are ready-to-go for your team:

NLP Risk Solutions IQ Program

This is a case-scenario learning experience integrating coverage education, industry group analysis and practical risk assessment. Coverage units include Commercial Property, Commercial General Liability and Workers Compensation. Risk Solutions IQ is an ideal development experience for sales and client management staff with less than 3 years experience in the industry Risk Solutions IQ runs as a 10-week blended learning program of self-paced assignments and four 'Live Learning' sessions. RSIQ can also be facilitated as a 3-day instructor-led program. Multi-week sessions conclude with a final project/presentation by the learner.

To learn more and register visit https://risksolutionsiq.com

High Value Home Consultant

The High Value Home Consultant is a series to prepare home appraisers for their roles inspecting and reviewing high value homes to validate insurance values and limits. This Curriculum offers over 15 hours of online learning that can be accessed and completed at the learner's own pace from home or work. Each course contains critical information necessary for the home appraiser's role, the home features (exterior and interior), property valuation and insurance to value. Each course contains high quality content, examples, narration, knowledge checkpoints, final assessment and job aids to use in the future. A certificate of completion is granted upon successful completion of the curriculum requirements.

Advancing Your Leadership Skills

NLP offers a six-month leadership program for junior to mid-level leaders targeting outcomes to grow maximize individual and leadership team strengths. The program includes tactical and strategic skill-based topics such as coaching to performance outcomes, communications, delivering feedback, leading change, leading virtual teams and performance planning. The curriculum includes a virtual campus setup with a guided curriculum of readings, e-learning courses, case situations, 360 feedback questionnaire and virtual / interactive workshops.

Business Skills for Service Specialists

Flexible curriculum designs include three, six, nine, or twelve month programs for service teams. Select from NLP's extensive Business Skills catalogue and workshop content to tailor a program that meets your team's needs. The content incorporates readings, e-learning courses, journal assignments, questionnaire/assessments, virtual and interactive workshops. Programs are available for any size budget.

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New Level Partners offers a wide variety of up-to-date and relevant content to meet many learning gaps and compliment any blended learning approach. From beginners to experienced staff, there is something for everyone. We get useful feedback and reports to help us fine-tune our educational offerings, and we get to experience NLP's excellent customer support to boot!

"

Game-Based Learning

An interactive and competitive game for your team to test their insurance knowledge! This game is equipped with a range of questions to challenge the gamer's knowledge of the insurance industry and Property & Casualty coverage concepts. Earn points, gain clients and move up the leaderboard!

Contact learn@newlevelpartners.com for more information!

Virtual Workshops

Workshops are offered to work teams or cohorts and adjusted based on roles and needs. Select topics to engage and growth your team's skills. Each 60-minute workshop is delivered by a facilitation expert. All sessions are delivered virtually or on-site with engagement features. Audience skill levels range from new hires, mid-level experience, advanced, front-line leadership and mid-level managers.

Insurance

With expertise in property and casualty lines of business, NLP offers workshop session on coverages, client case examples and reinforcement activities.

Sample Topics:

- ✓ Introduction to Insurance I
- ✓ Introduction to Insurance II
- ✓ Homeowners Insurance Basics
- ✓ Personal Automobile Insurance Basics
- ✓ Valuable Articles Coverage Basics
- ✓ Personal Liability Basics
- ✓ Introduction to Commercial Property
- ✓ Introduction to Commercial Liability
- ✓ Businessowners Property
- ✓ Businessowners Liability
- ✓ Workers Compensation
- ✓ Business Auto

Business Skills

The following Business Skills Workshops are tailored for insurance industry roles within agencies and insurance carrier, such as underwriting, service teams, sales, account executives, team leaders, associates, etc.

- ✓ Workshop Biz 1: Powerful and Persuasive Communications

Topics include Communication Styles, Credibility and Impressions, Power Words

- ✓ Workshop Biz 2: Value Pitch

Topics Include: Elements of the Value Pitch, Create Your Own Pitch, Pitch Delivery

- ✓ Workshop Biz 3: Introduction to Negotiations

Topics include: Negotiation Style Inventory, Seven Steps, Preparation, Questioning

Online Courses

Virtual Campus Curriculum

Game-Based Learning

Virtual Workshops

Education Consulting Services

Techniques, Exploring Options

✓ Workshop Biz 4: Practical Negotiation Skills

Topics Include: Apply the Techniques from Introductions to Negotiations, Case Scenario Application, Negotiation Practice

✓ Workshop Biz 5: Advanced Negotiation Skills

Topics Include: Fine-tune Negotiation Openers, Fact versus Assumption, Objection Tactics with Questioning Techniques

✓ Workshop Biz 6: Presentation Skills: Tips and Techniques for Virtual Presentations and In-Person

Topics Include: Preparation, Physical / Facilitation Skills, Virtual Presentation Tips, Presentation Practice

✓ Workshop Biz 7: Train the Trainer

Topics Include: Objectives, Prepare, Presentation Tips, Evaluation

✓ Workshop Biz 8: Business Writing Essentials

Topics Include: Positive/Negative Words, Composing Emails to Gain Optimal Results, Grammar Brush-Up

✓ Workshop Biz 9: Maximize Your Strengths @ Work (for Individuals, Teams or Leaders)

Topics Include: Personal Strengthscope Inventory and Report, Goal Setting and Action Plan

✓ Workshop Biz 10: Team Strengths and Strategies

Topics Include: Personal and Team Strengthscope Inventory and Reports, Team Strategic Plan

✓ Workshop Biz 11: Time Management

Topics Include: Setting Priorities, Managing Time Robbers, Creating Efficiencies

✓ Workshop Biz 12: Project Management 101

Topics Include: The Seven Step Success Method

✓ Workshop Biz 13: Generations in the Workplace

Topics Include: understanding Preferences when Working with Clients and Team Members

✓ Workshop Biz 14: Strengthening Business Relationships

Topics Include: Understanding Your Communication Style and Others, Managing Difficult Situations

✓ Workshop Biz 15: Emotional Intelligence Fundamentals

Topics Include: Understanding EQ, Five Main Components, Scenario Application

✓ Workshop Biz 16: Understanding DiSC Styles (Individuals and Teams)

Two 60-minute workshops

Topics Include: Complete DiSC Profile, Understanding Own DiSC Style, Working with Other DiSC Styles with Success

Leadership

✓ Workshop Lead 1: Moving Up to Team Leader

Topics Include: Empowering the Team, Delegation, Delivering Feedback

✓ Workshop Lead 2: Leading Productive Team Meetings

Topics Include: 'Musts' for a Great Team Meeting, Meeting Challenges

✓ Workshop Lead 3: Foundations of Change Management

Topics Include: The Change Process, Managing Reactions, 8 Step Change Model

✓ Workshop Lead 4: Coaching to Positive Performance Outcomes

Topics Include: Coaching Style Inventory, Leader's Style as Coach, Trust and Communication, Delivering Feedback

✓ Workshop Lead 5: Leadership Strengths @ Work

Topics Include: Leadership Strengthscope (360) Profile, Understanding your Leadership Strengths, Personal Action Plan

✓ Workshop Lead 6: Team Performance: Growth and Retention

Topics Include: High Performance Team Characteristics, Leading Various Performer Levels, Retention Strategies

✓ Workshop Lead 7: Project Management 101

Topics Include: The Seven Step Success Model, Project Planning, Facilitating Team Meetings

✓ Workshop Lead 8: Conflict Resolution

Topics Include: Types of Conflict, Techniques of Resolving Conflict

"Boost Your Negotiation and Sales Success"

Negotiation Techniques for the Insurance Industry Professional

Virtual Training Program – Three Levels

This program offers a negotiation framework, practice and proven techniques for the insurance newcomer, the experienced insurance pro and the leader / coach.

Level I: Negotiation Essentials: Preparation and Practical Approach

Target Audience: Team members with less than 2 years experience -- Producers, Account Executives, Account Managers, Underwriters, Underwriting Associates.

Format: Three 90 Minute Workshops

- ➢ Workshop 1: Powerful Communication and Impactful Openers
- ➢ Workshop 2: Negotiation Steps and Preparation
- ➢ Workshop 3: Virtual Negotiation (Practical Application)

Level II: Negotiation Techniques and Overcoming Challenges

Target Audience: Team members with 2+ years of experience – Producers, Account Executives, Account Managers, Underwriters, Underwriting Associates.

Format: Three 90 Minute Workshops

- ➢ Workshop 1: Negotiation Preparation, Openers and Calibrated Questioning
- ➢ Workshop 2: Virtual Negotiation (Practical Application)
- ➢ Workshop 3: Planning for the Expected and Managing the Unexpected and Objections

Level III: Coaching Negotiation Skills for Success

Target Audience: Leaders seeking negotiation principles and techniques to coach team members for success in negotiation skills.

Format: Three 90 Minute Workshops

- ➢ Workshop 1: Negotiation Steps and Preparation / Case Analysis
- ➢ Workshop 2: Powerful Communications: Openers, Messaging, Calibrated Questions
- ➢ Workshop 3: Techniques for Success with Challenging Negotiations and Handling Objections

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Education Consulting Services

Education Consulting Services

The New level Partners' team of instructional design experts provide a range of consulting services including the following:

- Learning Strategy Development and Planning

- Learning Management System or Portal Setup and Support

- Design and Development of Curricula (short-term and long-term)

- Full Project Management and Execution of Educational Initiatives (from needs assessment through evaluation)

- Custom courses, curricula, videos, games, eBooks

- Certification Programs (from conception to delivery)

- Virtual Campus Designs and Support

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