



## INDEPENDENT INSURANCE AGENTS & BROKERS OF LOUISIANA



What is insurance education? Is it about getting the necessary CE hours to renew your license? Is it looking for timely courses with information that is useful in your job? Is it striving to improve your soft skills?

From the perspective of insurance educators it is all of the above. IIABL has been providing quality education to you, our members, for over 30 years. In that time period there have been lots of changes. Our goal, as your association, is to keep up with these changes while still offering quality courses, instructors, content, etc. Educating your staff is important to your agency and you are important to IIABL.

In addition to our classroom schedule and webcasts IIABL is excited to offer these On Demand Courses. Some of these courses have been approved for CE credit but they are all great learning tools that will be beneficial to your agency.



### Masters

The Master Series are unique courses from industry experts. These short no frills webcasts will help you in many areas of agency operations. Topics on recruiting, sales & agency perpetuation are included in the Masters Series.

#### Roger Sitkins – Predictable and Guaranteed Sales Success

Nothing happens until someone sells something. Agencies constantly fight peaks and valleys in their new business production. Join leading sales expert, **Roger Sitkins**, for this comprehensive two-part series.

**Part 1 (30 min)** unlocks the secrets of sales success and guides viewers through “know your numbers,”

**Part 2 (45 min)** teaches professionals how to create the “Producer’s Perfect Schedule.” Roger will guide you through a step by step process of managing a diligent, focused process that will yield successful sales results!

Both Parts 1 & 2 are created for on-demand (No CE) viewing. What ideal content for an agency to host a lunch and learn! **Special Bundle discount applies when both Parts 1 & 2 are purchased!**

Tom Doran, Principal at Reagan Consulting offers two courses for professional development: **Insurance Agency Ownership:** National expert Tom Doran shares the results of their research into agency perpetuation plans. Learn how to maximize your agency value for transfer, develop internal buyers, plan for financing and prepare for transferring ownership. (No CE)

**Recruiting & Developing Young Producers:** Can agencies afford to hire young sales recruits? How do you maximize your chances of success in developing young producers? Tom Doran, Principal at Reagan Consulting, shares research into how agencies are recruiting young producers, often right out of college, and giving them the best shot at success. (No CE)  
**Special Bundle discount applies when both of these segments are purchased!**



## CSR Training

The Customer Service Representative is key employee in every agency and is a difficult commodity to find. If you have a new employee with little or no insurance knowledge the CSR training offering below is a great way to jump start your CSR trainee with some of the fundamentals of the CSR job. These courses will only take 2 hours **or** less of their time but the value of the knowledge gained is timeless.

### The Ultimate Account Manager

#### **Module 1: Characteristics of the Ultimate Account Manager (No CE)**

- Understand the three components of outstanding customer service: desk management, client management, and risk management
- Recognize the characteristics that make a person an outstanding service
- Describe the customer service triad: skills, knowledge and commitment

#### **Module 2: The Insurance Marketplace (2 Hours CE)**

- Describe insurance market cycles and their importance in managing a client's account
- Explain the current status of the insurance marketplace to customers and others
- Describe the basics of underwriting, including what role the underwriter plays, what their information needs are, and why accurate underwriting information is important for client account management
- Understand the organizational structure of the modern independent insurance agency

#### **Module 3: Desk Management, Risk Management (2 Hours CE)**

- Recognize the fundamentals of successful desk management and how that relates to extraordinary customer service.
- Explain the basics of the risk management process, including exposure identification and alternatives to traditional insurance arrangements

**Special Bundle discount applies when all 3 modules are purchased!**

### CSR Essentials

**Relationship Management:** This class will give you the skills needed to build successful relationship with your co-workers, managers & clients. You will complete case studies and skill reinforcement activities that will ensure the learning stays with you. (No CE)

**Verbal Communication Skills - Phone Etiquette & Client Interaction:** This webcast is designed to address the specific challenges that your company's staff faces when delivering difficult messages to your customers. Through these tough situations, we know that our goal is to create a satisfying outcome and to retain a customer for your company. (No CE)

**Personal Time Management:** Strategies for Managing Priorities, Improving Productivity and Achieving Your Goals begins with an attendee pre-class assignment to identify the core responsibilities of their role and how their time is allocated each week. (No CE)

**Special Bundle discount applies when all 3 modules are purchased!**

## Environmental Strategist



Becoming a certified environmental Strategist™ (eS) will equip you with the knowledge to identify, manage and transfer environmental exposures impacting everyday business. Since every business is impacted by environmental exposures, today's transparent business environment is driving demand for certified eS much like the computer industry created demand for IT professionals.

Whether you want to earn the eS designation or further your education on environmental issues that can impact your clients, we are pleased to offer the four modules listed below:

**Module 1: Managing Environmental Exposures** (1 Hr. CE) This module will review a variety of important environmental exposures like Federal and State environmental laws so agents are aware of what they are and how they impact their clients/prospects.

**Module 2: Transferring Environmental Exposures** (1 Hr. CE) Seminar participants will learn how environmental liability insurance can fill gaps in standard property and casualty insurance coverage. They will also learn about each type of environmental liability insurance available (Contractors Pollution Liability, Environmental Impairment Liability, Transportation Pollution Liability, Storage Tank Insurance, Professional Liability...) in the market place today.

**Module 3: Environmental Risk Assessment** (1 Hr. CE) Designed to educate a business on their environmental exposures so the business and their insurance professional are on the same page about the environmental exposures impacting their operations and make an informed decision if environmental insurance can add value to their business model.

**Module 4: Environmental Management Strategy** (1 Hr. CE) The Environmental Management Strategy (EMS) shows insurance professionals, by proactively addressing the environmental issues impacting their clients/prospects they not only bring more value added service to the table but they improve the quality of their product offering.

**Special Bundle discount applies when all 4 modules are purchased!**



### cyRM Designation (Cyber Risk Manager)

Completion of the Cyber Exposures & Insurance – Training for Agents & Brokers course qualifies you to register for the cyRM certification for FREE. Successfully completion of the online course & testing will earn you the cyRM designation.

This course has been filed for CE hours and will be available upon approval.

This Course teaches fundamental elements of cyber risk perils and cyber risk insurances available today. The Course addresses: known types of cyber loss; risk identification and measurement; 1st party, 3rd party, breach response & mitigation; privacy and statutory requirements; risk management & prevention; cyber risk policy considerations; cyber insurance policies. The Course provides knowledge and guidance on incorporating cyber risk insurance into every commercial insurance proposal.