

DISTANCE LEARNING - FOUNDATIONS

Program begins: Week 1 online courses

- Welcome
- What to Expect
- Introductions
- Meet your Coach
- How CIC operates
- Skills Assessment
- Coaching Questionnaire
- DISC Assessment

Virtual led session – Property: Week 2 online courses and webinar

- Key Terms of Property & Casualty Insurance
- Into to Commercial Property
- Construction, Occupancy, Protection & Exposure
- Business Income
- **Live Virtual Webinar - Property**

Virtual led session – General Liability: Week 3 online courses and webinar

- Legal Principles
- Intro to Commercial General Liability
- **Live Virtual Webinar - GL**

Virtual led session – Auto Liability: Week 4 online courses and webinar

- Intro to Commercial Auto
- Underwriting concepts – introduction & symbols
- **Live Virtual Webinar - Auto**
- Workers Compensation
- Umbrella Coverage
- Introduction to the Success Engine

FIRST IN-PERSON SESSION – begins the 5th week

Day 1

8:00–8:45	Welcome & class introductions
8:45-9:30	Executive Welcome
9:30-9:45	Break
9:45-10:45	Values Exercise/Your Why
10:45-11:00	Break
11:00-12:20	DISC Personality
12:20-1:15	Lunch
1:15-2:30	Skills Tools
2:30-2:40	Break
2:40-4:15	Risk Assessment
5:00-7:00	Dinner with Commercial & Sales Execs



New Agent Program

Full program agenda & courses

Day 2

8:00–8:15	Review exercise
8:15–9:30	Behavior Management
9:30–9:45	Break
9:45–11:15	Success Engine: Identification
11:15–11:45	Data Axle Demo
11:45–12:45	Lunch
12:45–2:00	Common Endorsements/Umbrella
2:00–2:15	Break
2:15–3:45	Risk Assessment
3:45–3:55	Break
3:55–4:40	Your Pitch
4:40–6:30	Your Pitch Networking & Happy Hour

Day 3

8:00–8:15	Review exercise
8:15–9:45	Success Engine: Qualification
9:45–10:00	Break
10:00–12:00	Workers Compensation
12:00–1:00	Lunch
1:00–2:30	Success Engine: Exploration
2:30–2:45	Break & Group Photos
2:45–4:30	Risk Assessment

Day 4

8:00–8:15	Review Exercise
8:15–9:00	Pipeline Management
9:00–9:15	Break
9:15–10:45	Success Engine: Implementation
10:45–11:00	Break
11:00–11:45	Carrier Relationships
11:45–12:45	Lunch
12:45–1:15	Loss Control
1:15–2:00	Winning Submissions
2:00–2:15	Break
2:15–4:15	Risk Assessment with cover letter
5:00	Dinner

Day 5

8:00–8:15	Review
8:15–9:30	Group Presentations
9:30–9:45	Break
9:45–11:15	Success Engine: Continuation
11:15–11:30	Your Why
11:30–11:45	Moving Forward



New Agent Program

Full program agenda & courses

DISTANCE LEARNING: Virtual Instructor Led Sessions

Topics

Behavior Management/Scorecards

Identification

Additional Insureds

Consumers Purchasing Decision - Scott Addis

Qualification

Premium Audit & GL Classifications

Crime

LinkedIn - Social Sales Link

Exploration

90 Day Business Acumen Challenge – InCite

Head Trash/Business Plans

Cyber Liability

Inland Marine

Implementation

Building Your Network - Scott Addis

Conversion- InCite

Contractors Liability - Risk Transfer

Continuation

Professional Liability

***All sessions will be held on Wednesday or Thursday's at 10:30 a.m. EST.**

Coaching

Weekly coaching calls

Monthly group coaching calls



New Agent Program

Full program agenda & courses

SECOND IN-PERSON SESSION

Day 1

7:00-8:30	Breakfast Buffet
8:00-9:00	Welcome Back/Intro/Your Why
9:00-9:15	Break
9:15-12:15	Business Income
12:15-1:15	Lunch
1:15-2:45	Sales Simulator
2:45-3:00	Break
3:00-4:20	Management Liability, Surety, PL and Life Vendor Session
4:20-6:30	Happy Hour

Day 2

7:00-8:30	Breakfast Buffet
8:00-11:30	Sales Simulator
11:30-12:30	Lunch
12:30-2:30	Sales Simulator – Continued
2:30-2:40	Break
2:40-5:00	Incite Performance - Attributes, 90 Day Challenge follow up, 3 ways to sell

Day 3

7:00-8:30	Breakfast Buffet
8:00-9:40	Sales Simulator – Final Prep
9:40-10:20	Team 1 – Presentation
10:20-10:30	Break
10:30-11:10	Team 2 – Presentation
11:10-11:20	Break
11:20-12:00	Team 3 – Presentation
12:00-1:00	Lunch
1:00-2:30	Excess & Surplus Lines
2:45-4:30	Machinery & Equipment
5:00	Dinner outing

Day 4

7:00-8:30	Breakfast Buffet
8:00-11:00	Sales Simulator Feedback
11:00-12:00	Awards/Program Wrap