InsurAcademy | Agent Development Program

AGENT DEVELOPMENT PROGRAM

Providing turnkey agent training solutions

ALREADY IN THE PROGRAM? ENROLL YOURSELF OR YOUR AGENTS IN ANY OF THESE LEARNING PLANS. LOG IN TO *MY.IIANC.COM*, AND CLICK ON "ADP PROGRAM" TO ACCESS THE COURSES

Interested in joining the program? Visit our *ADP Program page*

Contact us at InsurAcademy@iianc.com for a customized plan.

LEARNING PLANS

1 INTRODUCTION TO THE INSURANCE INDUSTRY LEARNING PLAN

This learning plan provides a foundational overview of the property and casualty insurance industry for new professionals or those seeking a refresher. Learners will explore essential industry concepts, including the purpose and structure of insurance, common distribution channels, and the principle of risk transfer. The plan also introduces key topics such as Errors & Omissions (E&O) exposure and agency compliance. By completing this series, participants will build a strong understanding of the insurance ecosystem and gain the confidence to support clients, carriers, and internal teams with professionalism and accuracy.

1. **The Insurance Industry Introduction**
2. **Introduction to Property & Casualty**
3. **Introduction to Insurance Distribution Channels**
4. **Introduction to Risk Transfer in Insurance**
5. **Introduction to the Insurance Industry – Errors & Omissions Essentials**

2 INSURANCE RELATIONSHIP MANAGEMENT LEARNING PLAN

This learning plan is designed to strengthen relationship-building and communication skills within the insurance industry. Learners will explore how effective communication, trust, and conflict management contribute to stronger agency and client relationships. The plan also covers the dynamics of working across generations and personality types, providing strategies for building cohesive, high-performing teams. By the end of this series, participants will be equipped to foster collaboration, manage challenges professionally, and deliver exceptional client and team experiences.

1. **Mastering Communication for Relationship Management**
2. **Understanding Agency Relationships**
3. **Foundations of Trust and Conflict Management in Insurance**
4. **Diversity to Unity: Mastering Multigenerational Dynamics, Personalities, and Effective Team Traits**

3

PERSONAL LINES LEARNING PLAN
CE CREDIT

This learning plan offers an in-depth exploration of personal lines insurance, with a focus on homeowners, auto, and specialty coverages. Learners will build foundational knowledge of liability and property coverages, the Dwelling Property Program, and the unique aspects of HO-3, HO-4, and HO-6 policies—including both 2011 and 2022 editions. The plan also addresses policy conditions, multi-state filing changes, and specialized coverages such as personal umbrella, personal articles floaters, and watercraft. By completing this series, insurance professionals will be equipped to confidently advise clients and apply coverage knowledge across a wide range of personal insurance scenarios.

1. **Homeowners' Basics: Liability Introduction**
2. **Homeowners' Basics: Property Introduction**
3. **Dwelling Property Program**
4. **Unique Nature of the HO-6 (2022 Edition)**
5. **Homeowners' Forms Policy Conditions**
6. **HO-2022 Homeowners Multi-State Filing**
7. **Understanding the HO-4 (2022 Edition)**
8. **HO-3 Homeowners Policy (2022 Edition)**
9. **HO-3 Homeowners Policy 2011 Edition Date**
10. **Understanding the HO-4 Homeowners Policy (2011 Edition)**
11. **Unique Nature of the HO-6 Homeowners Policy (2011 Version)**
12. **Comparing and Contrasting the HO-4 and HO-14**
13. **Personal Auto Policy Basics**
14. **Insurance to Value (ITV) Basics**
15. **Personal Umbrella Basics**
16. **Personal Articles Floater Basics**
17. **Watercraft Coverage Basics**

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COMMERCIAL LINES LEARNING PLAN
CE CREDIT

This comprehensive learning plan provides a strong foundation in Commercial Lines insurance, covering essential policies, coverage forms, and underwriting principles. Learners will explore core topics such as Business Income, Extra Expense, Commercial Property (including COPE, valuation, and rating), and Commercial Auto. In-depth modules on General Liability, Workers' Compensation, and Businessowners Policies (BOP) provide clarity on coverages, exclusions, and policy conditions. Additional topics include Certificates of Insurance, Surety Bonds, OCP, Commercial Umbrella, and legal liability concepts. Upon completion, participants will be prepared to confidently navigate Commercial Lines products and effectively support client and carrier needs.

1. **Understanding Business Income and Extra Expense**
2. **Mastering Certificates of Insurance: Best Practices for Risk Management and Client Protection**
3. **Business Auto Policy Basics**
4. **Commercial Property Basics**
5. **Commercial Property Basics: COPE Underwriting**
6. **Commercial Property Basics: Coverages**
7. **Commercial Property Basics: Rating**
8. **Commercial Property Basics: Valuation**
9. **CGL Coverages and Exclusions**
10. **CGL Products-Completed Operations**
11. **Commercial General Liability Core Concepts**
12. **CGL Exclusions**
13. **Workers Compensation Core Principles**
14. **Workers Compensation Coverages**
15. **Workers Compensation Premium Development**
16. **Commercial Auto Declarations, Classifications and Rating**
17. **Surety Bonds Basics**
18. **Owners and Contractors Protective Liability (OCP)**
19. **Introduction to Commercial Umbrella**
20. **Introducing BOP Property Coverages**
21. **Introduction to BOP Liability Coverages**
22. **Insureds, Additional Insureds and Legal Liability**
23. **Commercial Policy Conditions**

5

NC SPECIFIC
INSURANCE FORMS & RATINGS - PERSONAL LINES LEARNING PLAN

This learning plan provides a thorough understanding of North Carolina-specific personal lines insurance requirements and regulatory structures. Learners will gain practical knowledge of essential forms such as the FS-1 and DL-123, along with a foundational understanding of the North Carolina Rate Bureau's role in managing personal lines coverages. By completing this plan, insurance professionals will be better equipped to ensure compliance, support clients effectively, and navigate the unique requirements of the North Carolina insurance market.

1. **Personal Lines Forms - NC specific forms such as FS-1 and DL-123**
2. **Foundations of the NC Rate Bureau – Personal Lines**

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NC SPECIFIC
INSURANCE FORMS & RATINGS - COMMERCIAL LINES LEARNING PLAN

This learning plan provides a thorough understanding of commercial lines insurance forms and ratings. It covers ACORD forms, endorsements, bond forms, certificates of insurance (COIs), and the foundational principles of the North Carolina Rate Bureau for commercial lines. Interactive elements and assessments ensure comprehensive knowledge and practical application.

1. **Commercial Forms - ACORD forms, endorsements, bind forms, COIs**
2. **Foundations of the NC Rate Bureau – Commercial Lines**

7

BEST PRACTICES CSR COMMUNICATION LEARNING PLAN

This learning plan helps CSRs master essential communication skills. Courses cover personal time management, balancing customer priorities, strategies for engaging and resolving conflict, and sales basics, including active listening and uncovering customer needs. Interactive elements and assessments ensure effective learning and application.

1. **Time Management Essentials**
2. **Effective Client Management**
3. **Communication Excellence: Strategies for Engaging, Listening, and Resolving Conflict**
4. **Strategic Cross-Selling for Account Managers**

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TIPS & TRICKS FOR MANAGING TECHNOLOGY LEARNING PLAN

This learning plan helps professionals master technology efficiently, including AI tools. It covers videoconferencing with Zoom and Microsoft Teams, proper etiquette, using multiple monitors, and managing cameras, microphones, backgrounds, and lighting. Additionally, it provides tips and tricks for Microsoft Office and Google Suite, including Excel, PowerPoint, Outlook, OneNote, and calendar management. Interactive elements and assessments ensure practical application and proficiency.

1. **Insurance Technology Mastery**
2. **Mastering Google Workspace and Microsoft Office Tools**

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ESSENTIALS OF PROFESSIONAL EXCELLENCE LEARNING PLAN

This learning plan is designed to cultivate professional excellence by focusing on key skills. It includes leading with emotional intelligence, covering topics such as EQ, client interactions, stress management, and team dynamics. Additionally, it covers mastering professionalism and business etiquette, including client and team interactions, dining etiquette, business attire, punctuality, and Zoom/Teams etiquette. The plan also emphasizes efficient workflow mastery, with a focus on AMS, carrier websites, work settings, and document sharing. Interactive elements and assessments ensure practical application and development.

1. **Leading with Emotional Intelligence**
2. **Mastering Professionalism and Business Etiquette**
3. **Efficient Workflow Mastery**

10

EMPLOYEE BENEFITS INSURANCE BASICS

This learning plan provides a foundational introduction to Employee Benefits and is ideal for new professionals entering the field. Learners will build core insurance knowledge, explore key terminology, and gain a broad understanding of group benefits coverages. The plan also addresses critical legal and compliance requirements and introduces the essential role of the employee benefits broker. By completing this plan, participants will develop a strong base for supporting clients, navigating regulatory responsibilities, and contributing effectively to employee benefits administration and strategy.

1. **Introduction to Insurance: Employee Benefits**
2. **Group Employee Benefits: Insurance Basics**
3. **Employee Benefits Basics: Legal Essentials Overview**
4. **Employee Benefits Basics: The Employee Benefits Broker**
5. **Employee Benefits: Healthcare & Group Benefit Plans**
6. **Employee Benefits: Medical Plans & Concepts**
7. **Employee Benefits: Affordable Care Act**
8. **Employee Benefits: Health Savings Accounts**
9. **Affordable Care Act and Health Savings Accounts**
10. **Employee Benefits: Understanding Plan Documents**
11. **Employee Benefits: Flexible Spending Accounts**
12. **Employee Benefits: Health Reimbursement Arrangements**
13. **Employee Benefits: Tax Advantage Plans**
14. **Introduction to Prescription Drug Plans**
15. **Group Healthcare Funding Concepts**
16. **Employee Benefits: Wellness & Disease Management**
17. **Overview of Medicare and Medicaid**
18. **Ancillary Benefits Overview**
19. **Vision Insurance Basics**
20. **Dental Insurance Basics**
21. **Life Plan Basics**
22. **Long-Term Care Insurance**
23. **Disability Plan Basics**

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TEAM LEADER'S AND NEW MANAGERS SERIES

This learning plan builds essential leadership skills for new managers, covering modern recruiting and hiring practices, employee retention strategies, and key HR compliance basics. Participants also learn performance management fundamentals and effective coaching techniques to support team growth and create a positive, high-performing workplace.

TEAM LEADER'S AND NEW MANAGERS SERIES

1. **Introduction to Recruiting and Hiring**
2. **Recruiting and Hiring – Assessment, Interviewing, and Selection**
3. **Employee Retention**
4. **Human Resources Risk Management For Your Firm**
5. **Performance Management Principles**
6. **Effective Coaching Techniques for Leaders**
7. **Virtual Team Leadership Series**
    a. Passport to Virtual Leadership
    b. Passport to Virtual Leadership - Virtual Team Types
        i. Virtual Team Types: The Endurance Cyclist
        ii. Virtual Team Types: The Trail Hiker
        iii. Virtual Team Types: The Extreme Mountaineer
        iv. Virtual Team Types: The Relay Team

Live Monthly Webinars:

TECHNICAL INSURANCE TOPICS

- COPE
- Business Income
- Homeowners
- Additional Insureds
- Risk Management
- Errors & Omissions

PROFESSIONAL SKILLS TRAINING

- Mentoring Within the Agency
- Emotional Intelligence
- Professionalism and Business Etiquette
- Efficient Workflow Mastery
- Technology for Insurance
- Excellence in Service

...AND MANY MORE! LET US KNOW WHAT YOUR AGENTS NEED!

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