



**InsurAcademy** | Agent  
Development  
Program

# AGENT DEVELOPMENT PROGRAM

NORTH CAROLINA  
**Resource Guide**

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## Overview

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The Agent Development Program powered by InsurAcademy provides customized learning for new agents and those seeking professional growth. It features self-paced courses, industry expert-led webinars, interactive learning, and a Mentor Program with one-on-one support and group sessions on relevant topics.

## Contact Information

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For questions or concerns, contact [Education@TheInsurAcademy.com](mailto:Education@TheInsurAcademy.com), 919-755-0847.

## Course Information

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Our curriculum provides expert guidance and instruction for growth-focused agents.

Take a closer look by downloading our [Agent Development Program Curriculum Flyer](#) to view all the available Learning Plans and Courses designed to support your agents' professional growth.

Look at a more detailed version of the curriculum by downloading our [Agent Development Program Course Catalog](#).

## Webinars

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Stay current with live and recorded webinars led by industry experts. Topics covered include technical insurance knowledge, workflow best practices, and professional development designed to support agents at every stage of their careers. You will receive monthly webinar invitations via email with instructions for registering and joining these live events.

## Mentor Program

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The Mentor Program is designed to ensure new Account Managers thrive by providing expert industry knowledge, essential soft skills development, and valuable resources to elevate success. This program offers personalized virtual one-on-one mentorship and quarterly group sessions.

Learn more about the [Mentor Program](#) and click the [Complete the Interest Form](#) button. On the form, provide information about what you hope to accomplish with mentorship. Also, your name and contact information will be added to a list to receive invitations for the virtual quarterly group sessions.

## Hiring Assessments

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InsurAcademy provides free access to unlimited Wonderlic Select hiring assessments - a powerful tool that helps agencies streamline the hiring process, reduce turnover, and confidently select top-performing candidates for every role.

# All Users: How to Navigate Your Learning Center

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## How to Log In

Log in to your team page, explore available courses, and access courses that have been assigned to you.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Search for a Course

These steps will show you how to search for a course once you are logged into your Team Page.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Enroll in Courses

These steps will show you how to enroll in a course once you've logged into your Team Page.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Access Courses You've Enrolled In

These steps will show you how to access the courses you've enrolled in once you've logged in to your Team Page.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Search and Register for a Webinar

These steps will show you how to search for and register for a webinar once you've logged in to your Team Page.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Join a Live Webinar

These steps will show you how to join a live webinar once you've logged in to your Team Page.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Access Webinar Recordings

These steps will show you how to search for a recorded webinar once you've logged in to your Team Page.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to View Progress and Activity

These steps will show you how to see the activity and progress for the courses in your Learning Center.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Access the Help Center

For additional self-help support in your Learning Center, click the blue question mark icon on the bottom right corner of any page to open the Help Center.

We've partnered with *InsurAcademy's Agent Development Program* to offer you specialized courses, live webinars, mentorship, and customized learning paths for your professional growth.

**Weston Oaks  
INSURANCE**

**My Enrolled Courses**

**Explore Our Courses**

|                         |                         |                           |                                |                           |                     |
|-------------------------|-------------------------|---------------------------|--------------------------------|---------------------------|---------------------|
| Intro to Insurance      | Relationship Management | Commercial Lines Coverage | Personal Lines Coverage        | CSR Communication         | Managing Technology |
| Professional Excellence | Webinars                | FAQ                       | Employee Benefits & Healthcare | Team Leaders and Managers |                     |

**Agency Training**



## How to Access the Mentor Program

You can access the Mentor Program by clicking on the link below. You will provide information about what you hope to accomplish with mentorship. Also, your name and contact information will be added to a list so you will receive invitations for the virtual quarterly group sessions.

[Mentor Program and Interest Form](#)

## Team Managers: How to Navigate Your Learning Center

### How to Add Users

These steps will show you how to add users to your Team in the Learning Center.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

### How to Assign Content to Team Members

These steps will show you how to assign content, such as eLearning courses, to your team members in the Learning Center.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Generate Reports

Team reports contain data for all team member activity on team accessed content.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to View Users' Activity

View individual users' activity, including Certificates, Courses, Learning Paths, and more.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Use Teams Dashboards

The Teams Dashboard contain charts allowing you to visualize and analyze data on team member engagement and team content across your site.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Add Agency Custom Content and Learning Paths

There is functionality available to add custom content and learning paths for your agents. Please contact [Education@TheInsurAcademy.com](mailto:Education@TheInsurAcademy.com) or 919-755-0847 for assistance.

## Team Managers: How to Use Wonderlic Hiring Assessments

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### How to Add a Job Opening in Wonderlic

These steps will show you how to create a job posting.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Navigate Job Openings and Other Resources

These steps will show you how to navigate job openings and other resources.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

## How to Review Candidate Scoring Profile

These steps will show you how to review the candidate scoring profile.

[Step-by-Step Instructions](#)

[Instructional Video](#)

Detailed instructions are also found in the [addendum](#).

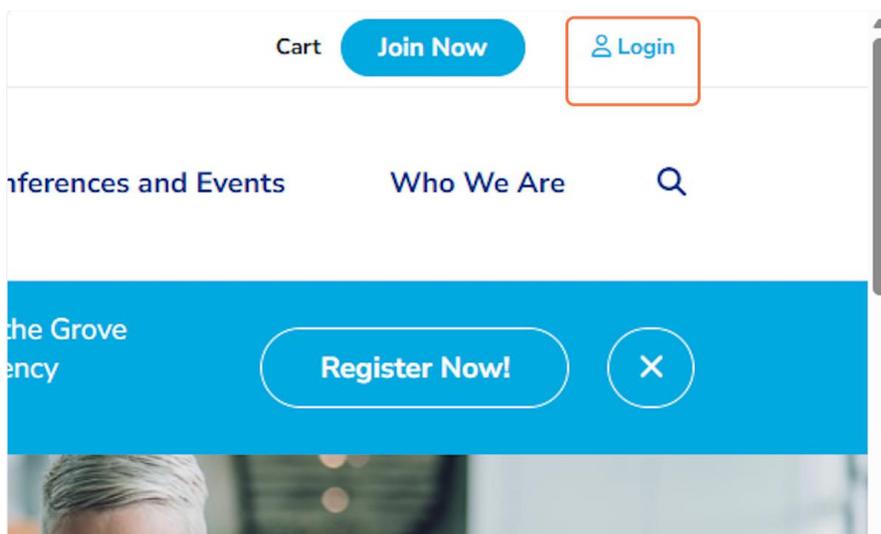
# Addendum

## How to Log In

Log in to your team page, explore courses available, and access courses that have been assigned

1. Log in using this URL: <https://learning.iianc.com/>

2. Click on Login



3. Enter your Username and Password



INDEPENDENT INSURANCE AGENTS  
OF NORTH CAROLINA





Agent  
Development  
Program

**Have an account?**  
Sign in below

Username or Email Address \*

Password \*

Keep me signed in if I close the browser

Sign In

**Sign In Help**  
Do you need help signing into our site?

**Don't have an account?**  
Create a new user account below

Business Phone

Agency/Company Name \*

#### 4. Click on Sign In

Password \*

.....

Keep me signed in if I close the browser

[Sign In](#)

## Sign In Help

Do you need help signing into our site?

#### 5. Hover over Education in the navigation menu and Click on MY LEARNING CENTER




[Membership](#)
[Agency Resources](#)
[Education](#)

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[MY LEARNING CENTER](#)

[Free CE - Flood, Ethics & E&C](#)

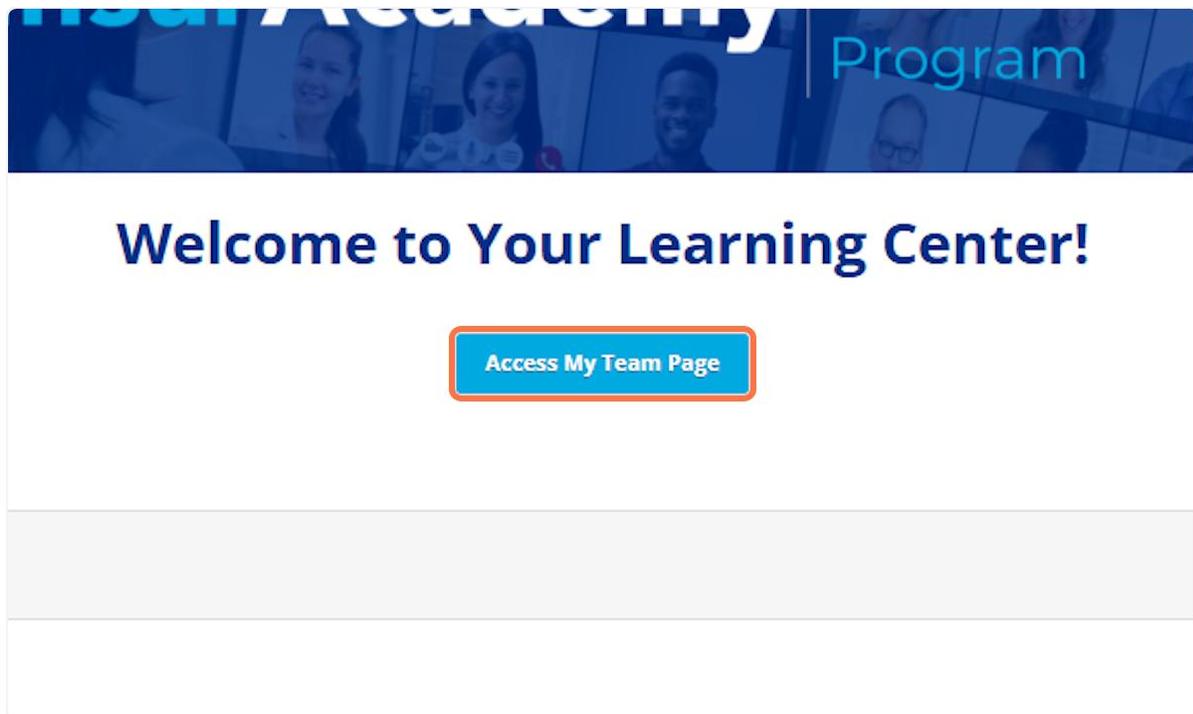
[Professional Designations](#)

[Training](#)

CIC Designation  
 James K. Ruble Seminars  
 CISR Designation  
 TRA (Trusted Risk Advisor) Program

Commercial Agent Training Series  
 CSR Master Class  
 IA-MBA  
 IIANC University - The Sales College  
 New Hire Training  
 The Ultimate Account Manager  
 Insurance Growth Academy

6. Click on Access My Team Page



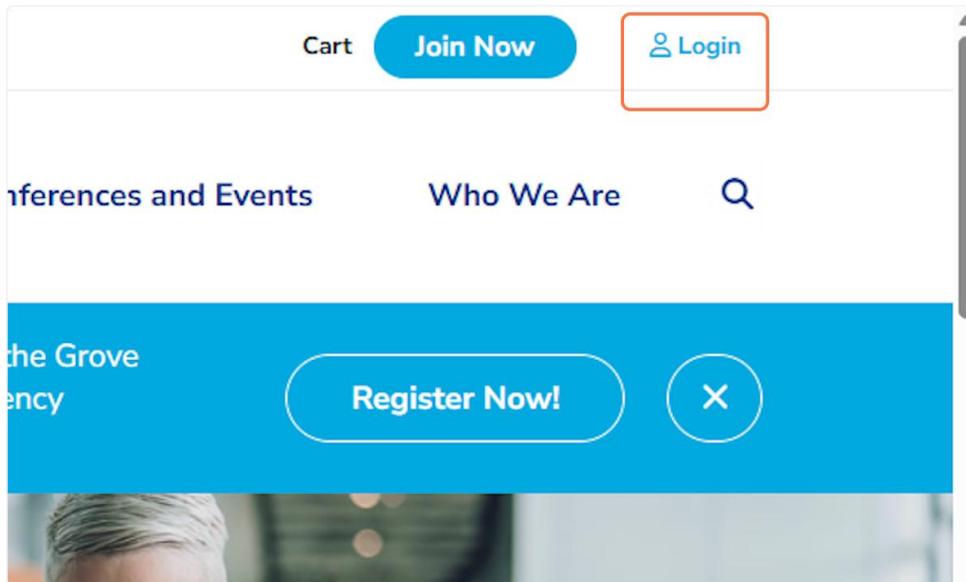
The screenshot shows a web interface for a learning center. At the top, there is a blue banner with the text "Your Academy Program" in white. Below the banner, the main content area is white and features the heading "Welcome to Your Learning Center!" in a large, bold, blue font. Centered below the heading is a blue button with a white border and rounded corners, containing the text "Access My Team Page". Below the button is a light gray horizontal bar, and at the bottom of the page is a white rectangular area.

## How to Search for a Course

These steps will show you how to search for a course once you are logged in to your Team Page.

### 1. Navigate to iianc.com

### 2. Click on Login



### 3. Enter your Username and Password

 A screenshot of the iianc.com login and registration page. The page header includes the iianc logo (INDEPENDENT INSURANCE AGENTS OF NORTH CAROLINA), the Trusted Choice logo, and the InsurAcademy Agent Development Program logo. The page is divided into two main sections: 'Have an account?' on the left and 'Don't have an account?' on the right. The 'Have an account?' section contains a 'Sign in below' heading and a login form. The login form has two input fields: 'Username or Email Address \*' with the value 'lburke@iianc.com' and 'Password \*' with masked characters. Below these fields is a checkbox for 'Keep me signed in if I close the browser' and a blue 'Sign In' button. The 'Don't have an account?' section contains a 'Create a new user account below' heading and a registration form with fields for 'First Name \*', 'Last Name \*', 'Email Address \*', 'Confirm Email Address \*', 'Create Password \*', 'Confirm Password \*', 'Business Phone' (with a dropdown for '+1' and the number '201-555-0123'), and 'Agency/Company Name \*'. The login form is highlighted with a red rectangular box.

#### 4. Click on Sign In

Password \*

.....

Keep me signed in if I close the browser

[Sign In](#)

## Sign In Help

Do you need help signing into our site?

#### 5. Hover over Education in the main navigation to open up the menu

Cart [Join Now](#) V

Agency Resources **Education** Conferences and Events

|                           |   |                   |
|---------------------------|---|-------------------|
| LEARNING CENTER           | Free CE - Flood, Ethics & E&O           | Online Learning   |
| Professional Designations | Training                                | InsurAcademy      |
| Continuing Education      | Commercial Agent Training Series        | Agent Development |
| Webinars                  | CSR Master Class                        | Mentor Program    |
| Education                 | IA-MBA                                  |                   |
| (Risk Advisor) Program    | IIANC University - The Sales Collective |                   |

6. Click on FIND A COURSE

[Membership](#)
[Agency Resources](#)

- [FIND A COURSE](#)
- [MY LEARNING CENTER](#)
- [Pre-Licensing Program](#)
- [Professional Designations](#)
- [CIC Designation](#)
- [James K. Ruble Seminars](#)
- [CISR Designation](#)
- [TRA \(Trusted Risk Advisor\) Program](#)

7. Click on View courses and enroll

NOTE: You must be logged into iianc.com in order to see the "Part of the Agent Development Program?" header and "View courses and enroll" button!

[Membership](#)
[Education & Events](#)
[Learning Center](#)
[Committees](#)
[Electronic Shop](#)

# Education and Events

digital ad display (wide)

## Part of the Agent Development Program?

[View courses and enroll](#)

offers a variety of continuing education and professional development opportunities in-person around the state and online via live webinars as well  
 Search below to find the right options for your professional development needs. Contact [education@iianc.com](mailto:education@iianc.com) with questions. [View IIANC's current education policies and disclaimers for education courses and events here.](#)

e to our learning center guide. In the next few minutes, we'll show you how to access all our resources and services so you can make the most of v  
 e with us

## 8. Click on Search courses...Use keywords to search

The Agent Development Program offers a customized learning experience for new agents and those seeking growth, featuring on-demand courses, branded awards, and certificates. Supported by monthly webinars with industry experts and interactive tools, the program also includes IIANC's new Mentor Program for personalized training, mentorship, and skill development in insurance and client management.

Search courses... Min CE Hours

Showing 98 of 125 courses

**Agency Development Program- Homeowners' Basics: Liability Introduction**  
 Agency Development Program  
 12/13/2024 8:00 AM 1.00 CE Hours Personal Lines [Open](#)

## 9. Click on Min CE Hours to filter by the number of CE Hours offered

Global - MX Find (MX- na - ADP course search)

**Course Search**  
 The Agent Development Program offers a customized learning experience for new agents and those seeking growth, featuring on-demand courses, branded awards, and certificates. Supported by monthly webinars with industry experts and interactive tools, the program also includes IIANC's new Mentor Program for personalized training, mentorship, and skill development in insurance and client management.

Search courses... Min CE Hours All Categories  Learning Plans Only

Showing 98 of 125 courses

**Agency Development Program- Homeowners' Basics: Liability Introduction** [View Course](#)  
 Agency Development Program  
 12/13/2024 8:00 AM 1.00 CE Hours Personal Lines [Open](#)

**Agency Development Program- Leading with Emotional Intelligence** [View Course](#)  
 Agency Development Program  
 1/22/2025 8:00 AM Professional Excellence [Open](#)

## 10. Or filter your search by Category by using the pull-down option

Global - MX Find (MX- na - ADP course search)

### Course Search

The Agent Development Program offers a customized learning experience for new agents and those seeking growth, featuring on-demand courses, branded awards, and certificates. Supported by monthly webinars with industry experts and interactive tools, the program also includes IANCA's new Mentor Program for personalized training, mentorship, and skill development in insurance and client management.

Search courses... Min CE Hours All Categories  Learning Plans Only

Showing 98 of 125 courses

Agency Development Program- Homeowners' Basics: Liability Introduction [View Course](#)

Agency Development Program  
 12/13/2024 8:00 AM 1.00 CE Hours Personal Lines Open

Agency Development Program- Leading with Emotional Intelligence [View Course](#)

Agency Development Program  
 1/22/2025 8:00 AM Professional Excellence Open

## 11. Find a course and Click on View Course to open a summary of the course, and a button to register for the course

[View Course](#)

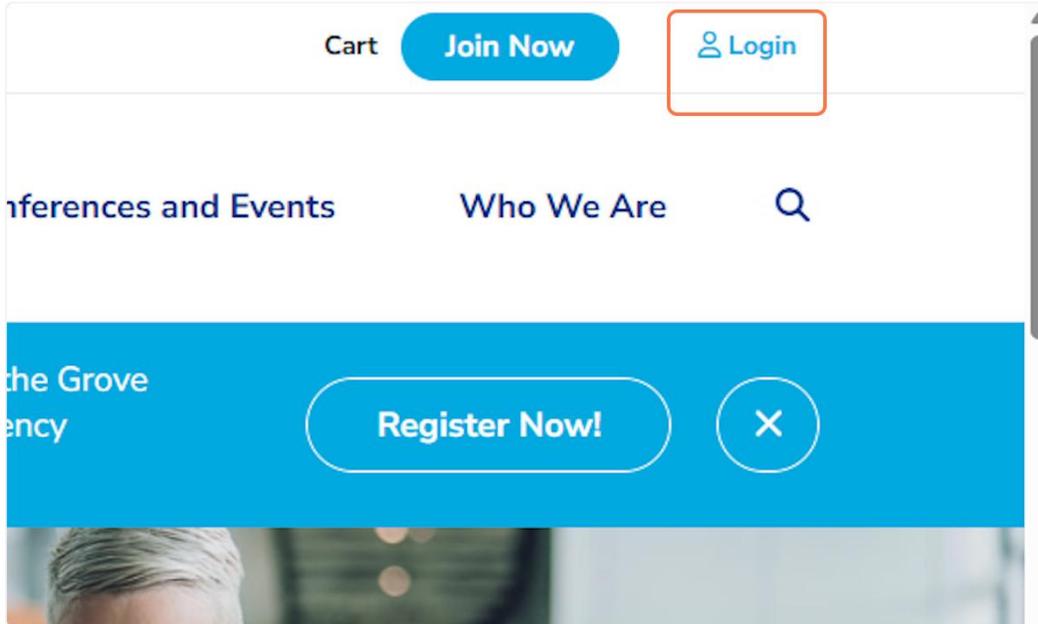
[View Course](#)

[View Course](#)

## How to Enroll in Courses

### 1. Navigate to iianc.com

### 2. Click on Login



### 3. Click on Username or Email Address \*...

 A screenshot of the iianc.com login and registration page. The page features the iianc logo (Independent Insurance Agents of North Carolina), the Trusted Choice logo, and the InsurAcademy Agent Development Program logo. The page is divided into two main sections: 'Have an account?' and 'Don't have an account?'. The 'Have an account?' section is highlighted with a red box and contains a 'Sign in below' heading, a 'Username or Email Address \*' field with the text 'lburke@iianc.com', a 'Password \*' field with masked characters, a checkbox for 'Keep me signed in if I close the browser', and a blue 'Sign In' button. The 'Don't have an account?' section contains a 'Create a new user account below' heading and several input fields: 'First Name \*', 'Last Name \*', 'Email Address \*', 'Confirm Email Address \*', 'Create Password \*', 'Confirm Password \*', 'Business Phone' (with a dropdown for '+1' and the number '201-555-0123'), and 'Agency/Company Name \*'.

#### 4. Click on Sign In

Password \*

.....

Keep me signed in if I close the browser

[Sign In](#)

## Sign In Help

Do you need help signing into our site?

#### 5. Hover over Education to open up the menu

Cart [Join Now](#) V

[Agency Resources](#)
[Education](#)
[Conferences and Events](#)

|                        |   |                   |
|------------------------|---|-------------------|
| LEARNING CENTER        | Free CE - Flood, Ethics & E&O           | Online Learning   |
| Special Designations   | Training                                | InsurAcademy      |
| Continuing Education   | Commercial Agent Training Series        | Agent Development |
| Webinars               | CSR Master Class                        | Mentor Program    |
| Education              | IA-MBA                                  |                   |
| (Risk Advisor) Program | IIANC University - The Sales Collective |                   |

## 6. Click on FIND A COURSE

The screenshot shows the top navigation bar of the IIANC website. On the left is the IIANC logo (Independent Insurance Agents of North Carolina) and the Trusted Choice logo. To the right are links for 'Membership' and 'Agency Resources'. Below the navigation bar is a dropdown menu with a dark blue background on the left. The 'FIND A COURSE' link is highlighted with an orange border. Other visible links in the menu include 'MY LEARNING CENTER', 'Pre-Licensing Program', 'Professional Designations', 'CIC Designation', 'James K. Ruble Seminars', 'CISR Designation', and 'TRA (Trusted Risk Advisor) Program'.

## 7. Click on View courses and enroll

The screenshot shows a digital advertisement for the Agent Development Program. At the top, it says 'digital ad display (wide)'. The main text reads 'of the Agent Development Program'. Below this is a blue button with the text 'View courses and enroll', which is highlighted with an orange border. At the bottom of the ad, there is a dark blue banner with white text: 'ion and professional development opportunities in-person around the state and on... tions for your professional development needs. Contact [education@iianc.com](mailto:education@iianc.com) with... [education courses and events here.](#)

## 8. Search for a course

Global - MX Find (MX- na - ADP course search)

### Course Search

The Agent Development Program offers a customized learning experience for new agents and those seeking growth, featuring on-demand courses, branded awards, and certificates. Supported by monthly webinars with industry experts and interactive tools, the program also includes IIANC's new Mentor Program for personalized training, mentorship, and skill development in insurance and client management.

Learning Plans Only

Showing 98 of 125 courses

**Agency Development Program- Homeowners' Basics: Liability Introduction** [View Course](#)

Agency Development Program  
12/13/2024 8:00 AM 1.00 CE Hours Personal Lines Open

**Agency Development Program- Leading with Emotional Intelligence** [View Course](#)

Agency Development Program  
1/22/2025 8:00 AM Professional Excellence Open

## 9. Once a course is found, Click on View Course

Learning Plans Only

[View Course](#)

[View Course](#)

## 10. Click on Register Online

This course provides a comprehensive overview of the ISO homeowners policy. Learners will examine the eleven parts of the coverage form, understand who is covered, and learn how to file a claim for Personal Liability and Medical Payments to Others. The course also explains how to file a claim for property damage and how to indemnify. Additionally, participants will review key property and liability endorsements and how to extend protection under the homeowners program.

Meeting - Event Start Registration

[Register Online](#)

## 11. Click on Start Registration

meetingregistration - Registration Single or Group

### Who are you registering?

You can register yourself and/or others from your agency or company.

Register Myself Only

Register Another Person(s) and/or Myself

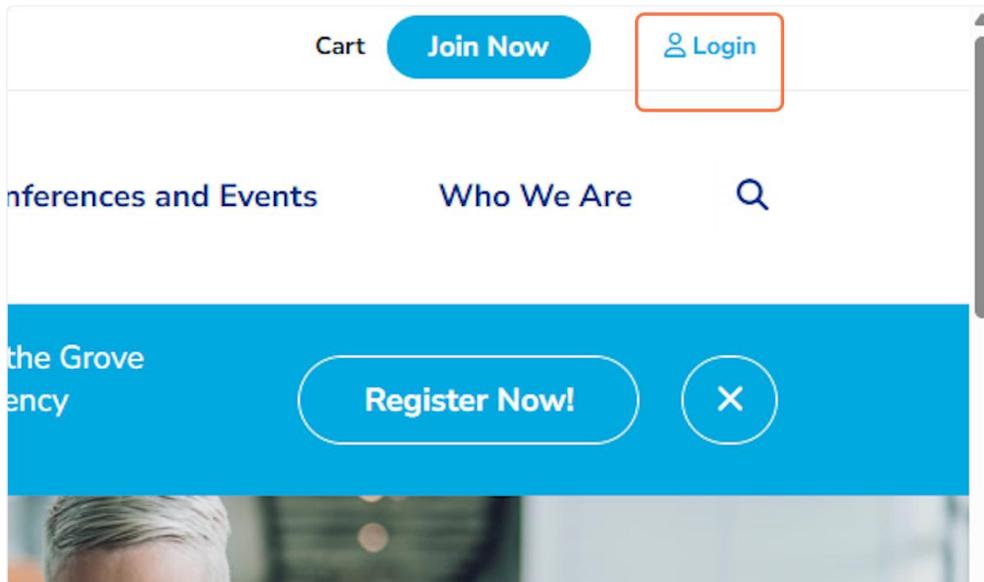
[Start Registration](#) [Cancel](#)

## How to Access Courses You've Enrolled In

These steps will show you how to access the courses you've enrolled in once you've logged in.

1. Log in using this URL: <https://learning.iianc.com/>

2. Click on Login



3. Enter Username and Password

 A screenshot of the iianc.com login and registration page. The page header includes the iianc logo (INDEPENDENT INSURANCE AGENTS OF NORTH CAROLINA), the Trusted Choice logo, and the InsurAcademy Agent Development Program logo. The main content is divided into two columns. The left column is titled 'Have an account?' and 'Sign in below'. It contains two input fields: 'Username or Email Address \*' with the text 'lburke@iianc.com' and a red eye icon, and 'Password \*' with a red eye icon. Below these fields is a checkbox labeled 'Keep me signed in if I close the browser' and a blue 'Sign In' button. The right column is titled 'Don't have an account?' and 'Create a new user account below'. It contains four input fields: 'First Name \*' and 'Last Name \*', 'Email Address \*' and 'Confirm Email Address \*', 'Create Password \*' and 'Confirm Password \*', and 'Business Phone' with a dropdown menu showing '+1' and the number '201-555-0123'. At the bottom of the right column is an input field for 'Agency/Company Name \*'. The login fields on the left are highlighted with a red rectangular box.

4. Click on Sign In

Password \*

.....

Keep me signed in if I close the browser

[Sign In](#)

## Sign In Help

Do you need help signing into our site?

5. Hover over Education to reveal the navigation menu and click on MY LEARNING CENTER

  [Membership](#) [Agency Resources](#) [Education](#)

[MY LEARNING CENTER](#) Free CE - Flood, Ethics & E&C

| Professional Designations                              | Training  |
|--|---|
| CIC Designation<br>James K. Ruble Seminars             | Commercial Agent Training Series<br>CSR Master Class<br>IA-MBA  |
| CISR Designation<br>TRA (Trusted Risk Advisor) Program | IIANC University - The Sales College<br>New Hire Training<br>The Ultimate Account Manager<br>Insurance Growth Academy |

6. View My Courses at the bottom of the page

The screenshot shows the top section of the InsurAcademy Agent Development Program Learning Center. At the top is a blue banner with the InsurAcademy logo and the text "Agent Development Program". Below the banner is the heading "Welcome to Your Learning Center!" and a button labeled "Access My Team Page". A search bar contains the text "My Courses". Below the search bar is a "Content" tab with a list of five courses, each with a 0% progress indicator.

| Course Name  | Progress |
|--|----------|
| Welcome to the Agent Development Program Overview Course | 0%       |
| Learning Plan - Introduction to the Insurance Industry   | 0%       |
| The Insurance Industry Introduction                      | 0%       |
| Introduction to Property & Casualty                      | 0%       |
| Introduction to Insurance Distribution Channels          | 0%       |

7. ANOTHER WAY TO VIEW YOUR COURSES IS... Click on Access My Team Page

This screenshot shows the same Learning Center interface as above, but with the "Access My Team Page" button highlighted with a red border. Below the button, the page content is mostly obscured by a grey bar, but the first course entry from the previous screenshot is visible at the bottom: "Welcome to the Agent Development Program Overview Course" with a 0% progress indicator.

## 8. Click on My Enrolled Courses

Partnered with **NAFC & Insurance Academy's Agent Program** to offer you specialized courses, live mentorship, and customized learning paths for your professional growth.

Want to know about how to navigate the learning center?

Check out our [FAQ page](#)

# NAFC

**My Enrolled Courses**

## Explore Our Courses

## 9. Click on Courses

To see customized section with content, be sure to impersonate a test user for a better editing experience.

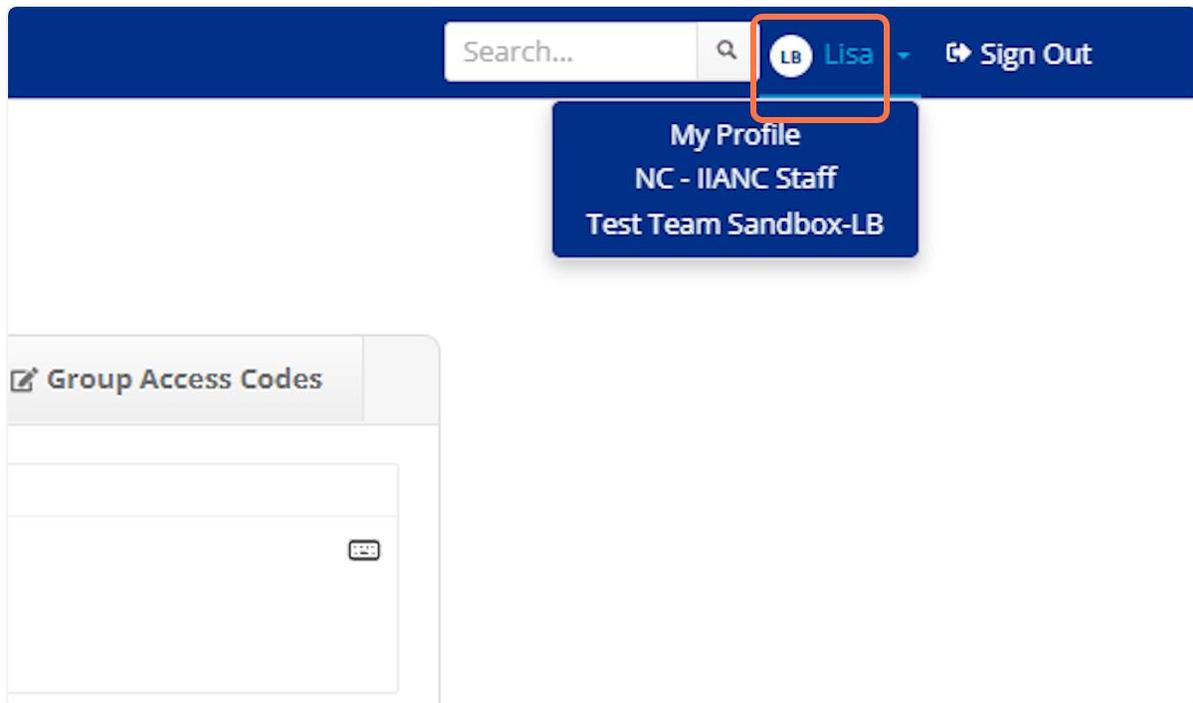
**Save** **Cancel**

**Purchased Content** **Courses** **Events** **Video Go**

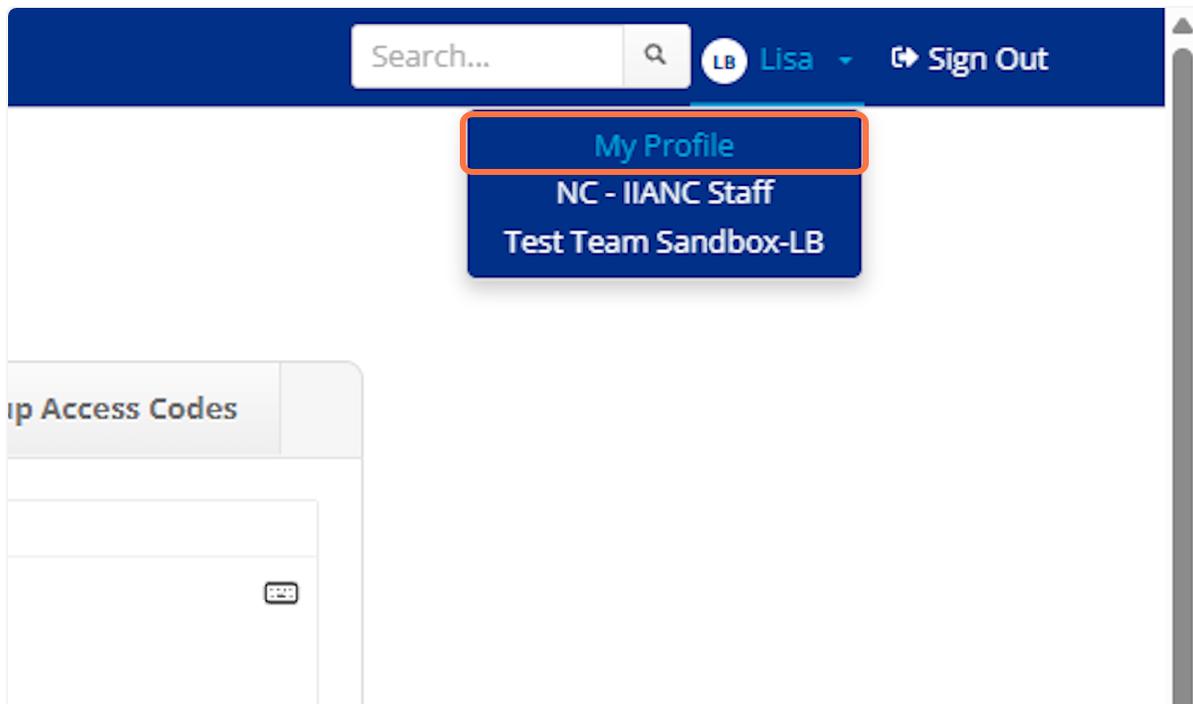
Active ▾

 [ACA & HSAs: Building a Strong Foundation for Financial](#)  
[Live Web Event: Tue, March 3, 2026 @ 11:00 AM EST](#)

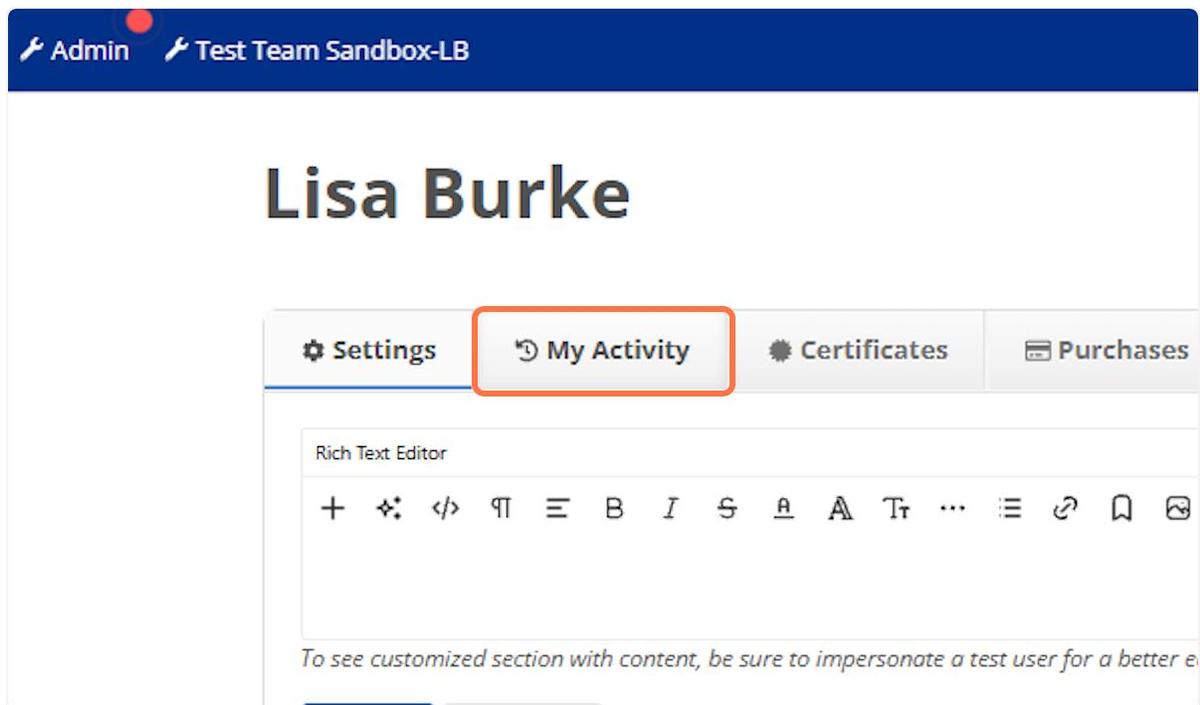
10. ANOTHER WAY TO VIEW YOUR COURSES IS... Click on on your username in the top right



11. Click on My Profile

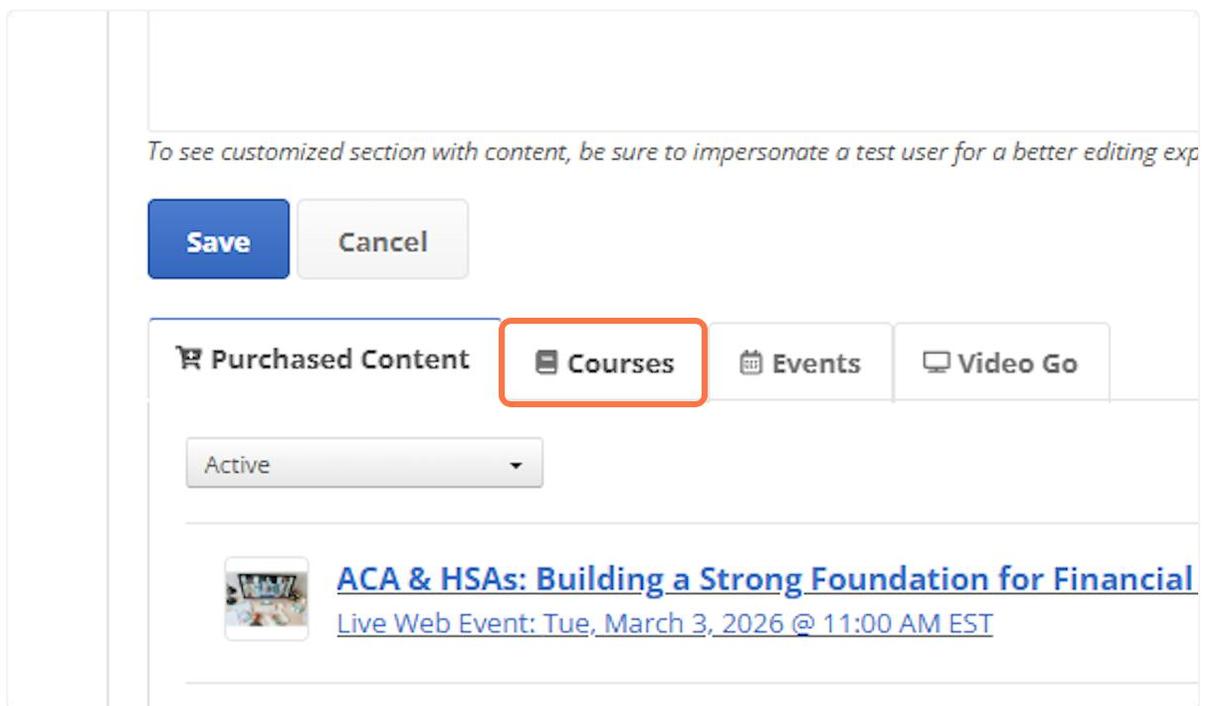


## 12. Click on My Activity



The screenshot shows the user profile page for Lisa Burke. At the top, there is a blue navigation bar with 'Admin' and 'Test Team Sandbox-LB'. Below the name 'Lisa Burke', there is a horizontal menu with four tabs: 'Settings', 'My Activity', 'Certificates', and 'Purchases'. The 'My Activity' tab is highlighted with an orange border. Below the tabs is a 'Rich Text Editor' with a toolbar containing various icons for text formatting and editing. At the bottom of the editor, there is a note: 'To see customized section with content, be sure to impersonate a test user for a better e'.

## 13. Click on Courses

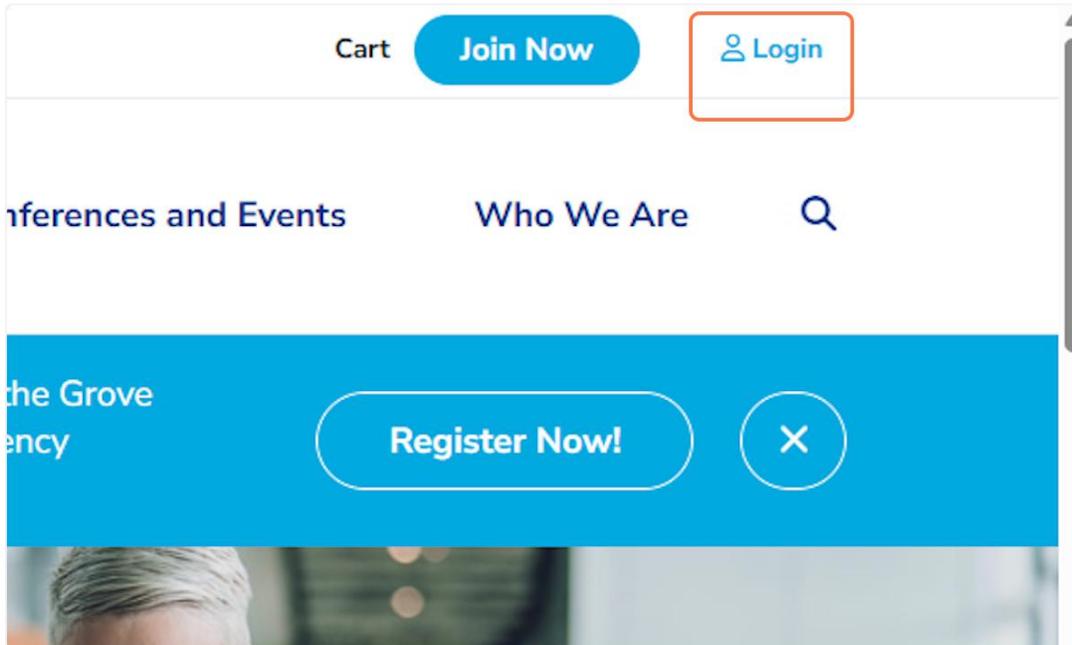


The screenshot shows the 'Purchased Content' section. At the top, there is a note: 'To see customized section with content, be sure to impersonate a test user for a better editing exp'. Below the note are two buttons: 'Save' (blue) and 'Cancel' (grey). Below the buttons is a horizontal menu with three tabs: 'Purchased Content', 'Courses', and 'Events'. The 'Courses' tab is highlighted with an orange border. Below the tabs is a dropdown menu with 'Active' selected. Below the dropdown menu is a list of purchased content items. The first item is 'ACA & HSAs: Building a Strong Foundation for Financial Live Web Event: Tue, March 3, 2026 @ 11:00 AM EST', which includes a small thumbnail image.

## How to Search and Register for a Webinar

### 1. Navigate to iianc.com

### 2. Click on Login



### 3. Enter your Username and Password



INDEPENDENT INSURANCE AGENTS  
OF NORTH CAROLINA





Agent  
Development  
Program

Have an account?  
Sign in below

Username or Email Address \*

Password \*

Keep me signed in if I close the browser

Sign In

Sign In Help  
Do you need help signing into our site?

Find my account by email address

Don't have an account?  
Create a new user account below

First Name \*

Last Name \*

Email Address \*

Confirm Email Address \*

Create Password \*

Confirm Password \*

Business Phone

Agency/Company Name \*

4. Click on Sign In

Password \*

.....

Keep me signed in if I close the browser

[Sign In](#)

## Sign In Help

Do you need help signing into our site?

5. Hover over Education in the main menu and Click on FIND A COURSE

  [Membership](#) [Agency Resources](#)

[FIND A COURSE](#) MY LEARNING CENTER Free C

Pre-Licensing Program Professional Designations Trainin

CIC Designation Comm  
James K. Ruble Seminars CSR M  
CISR Designation IA-MB.  
TRA (Trusted Risk Advisor) Program IIANC I  
New H  
The Ut  
Insuranc

## 6. Click on View courses and enroll

NOTE: You must be logged into iianc.com to see this button!

digital ad display (wide)

# of the Agent Development Program

[View courses and enroll](#)

ion and professional development opportunities in-person around the state and on... tions for your professional development needs. Contact [education@iianc.com](mailto:education@iianc.com) with... ucation courses and events here.

## 7. Select Webinar

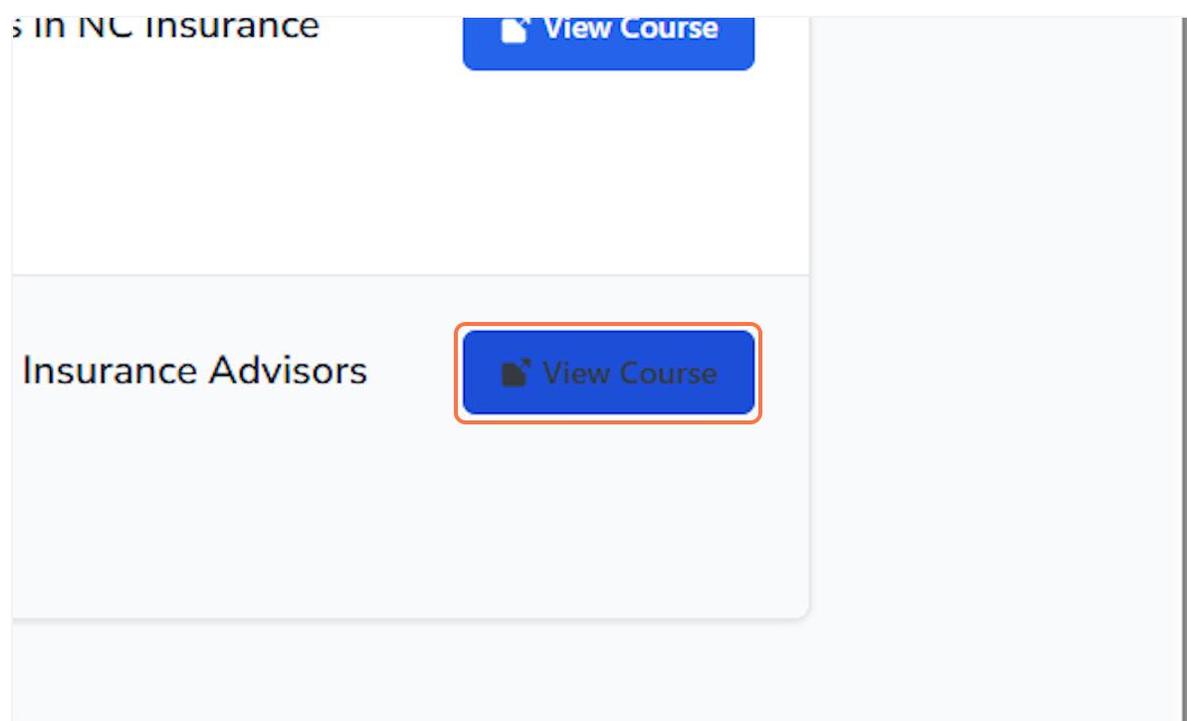
rs a customized learning experience for new agents and those seeking growth, featuring o... certificates. Supported by monthly webinars with industry experts and interactive tools, th... entor Program for personalized training, mentorship, and skill development in insurance an...

Min CE Hours  Webinar  Learning Plans Only

lines and Safeguards: Navigating Coastal Exposures in NC Insurance [View Courses](#)

Webinar [Open](#)

### 8. Find a webinar you'd like to join and Click on View Course



### 9. Click on Register Online

professionals will gain foundational insights to better support their clients' financ

Speaker: Tammie Grisso D'Allura, CPCU, CIC, President/Owner of Tammie DA

Date: Tuesday, March 3, 2026

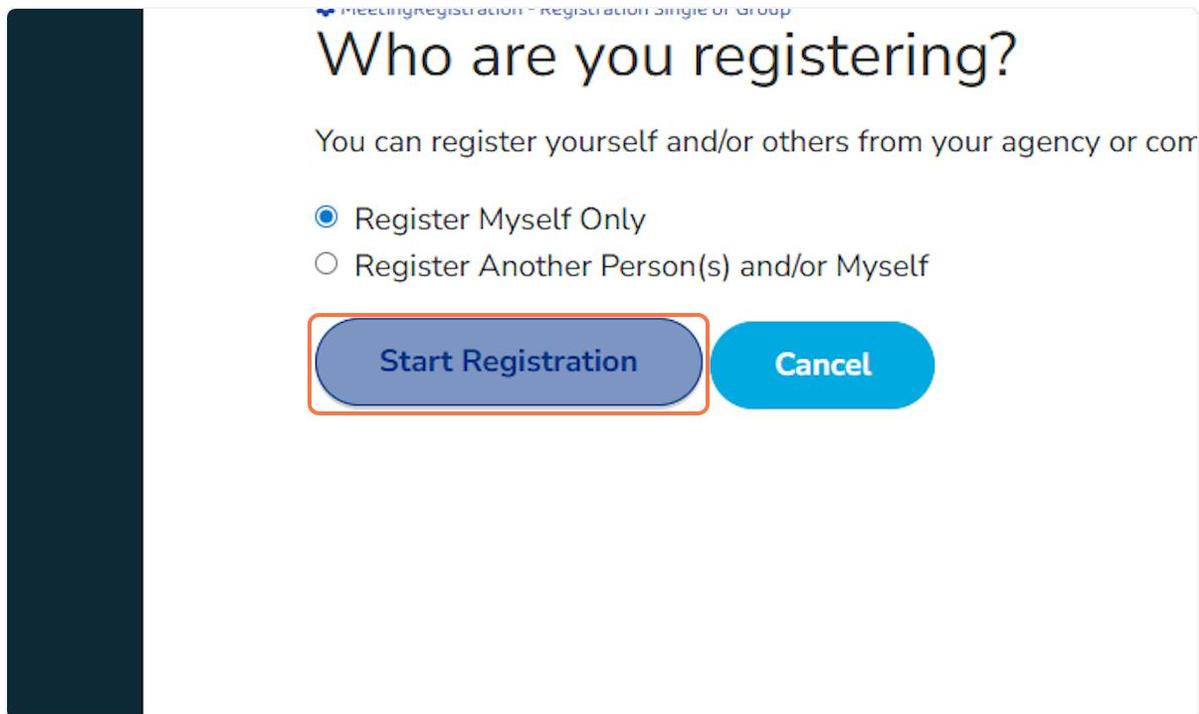
Time: 11:00 AM - 12:00 PM

Meeting - Event Start Registration

Register Online

Meeting - Event Additional

**10. Click on Start Registration and complete the steps.**



meetingregistration - Registration Single or Group

## Who are you registering?

You can register yourself and/or others from your agency or company.

Register Myself Only

Register Another Person(s) and/or Myself

[Start Registration](#) [Cancel](#)

**11. Once the registration steps are completed, you will receive a Registration Confirmation and Registration Reminder emails from the Learning Center with a blue Join button to use at the time of the event.**

## How to Join a Live Webinar

### 1. Click on the blue Join button in your Registration Confirmation or Registration Reminder email

You will receive a Registration Confirmation email upon registering for the webinar. You will also receive Registration Reminder emails 5 days, 1 day, and 1 hour prior to the event.

Agency Development Program: Registration Confirmation for Closing Coverage Gaps with I

 InsurAcademy <professionaldevelopment@iianc.com>  
To  Lisa Burke

 If there are problems with how this message is displayed, click here to view it in a web browser.  
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

### Registration Confirmation

Dear Lisa,  
Your registration has been confirmed!

**Event:** Closing Coverage Gaps with Equipment Breakdown Protection

**Date:** Tuesday, February 10, 2026  
**Time:** 8:00 AM PST / 9:00 AM MST / 10:00 AM CST / 11:00 AM EST  
[Add to Google Calendar](#)  
[Add to iCal or Outlook](#)

**System Check:**  
To ensure your computer is compatible for the live event, please perform a system check by clicking on the link <https://zoom.us/test> or by typing it into your internet browser. Please perform the system check on the same computer you will use for the live event.  
If your computer is compatible, you will receive a confirmation message on your screen and hear audio. Otherwise, please contact the Help Desk to resolve any issues.

**Joining the Event:**



If not signed in, click the "Sign In" button and enter your login to join.

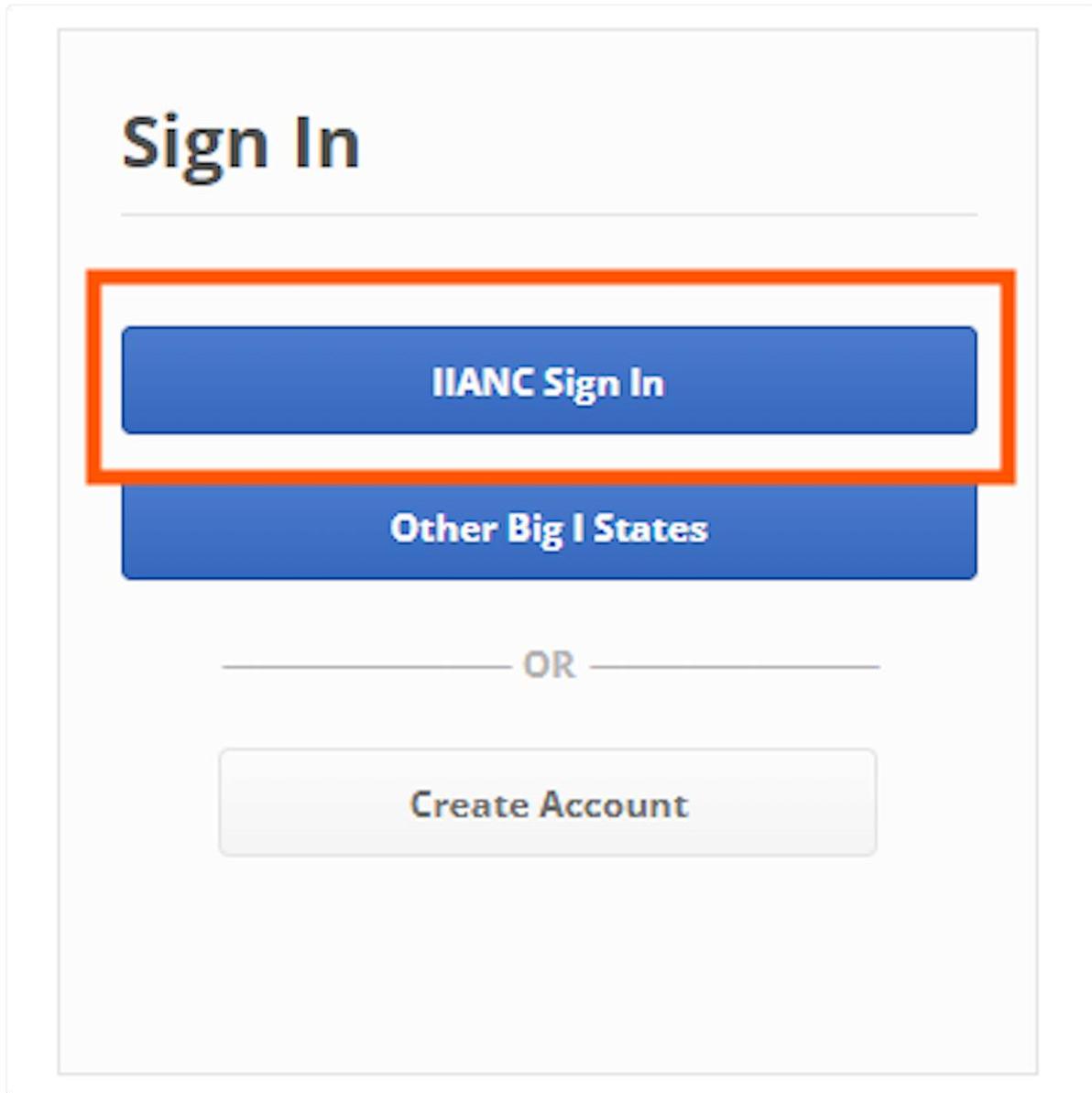
Click the "Join Live Web Event" button which will be available 30 minutes prior to the event start time.  
For best results, please disconnect from VPN connections.

**Audio:**  
Audio can be heard through your computer speakers. Please be sure that your computer speakers are on, and that your volume is up.

**Help Desk:**

2. Click on **IIANC Sign In** to log into your IIANC account, if you're not already signed in

Once logged in, you will be taken to the webinar's landing page in the learning center.



**Sign In**

---

**IIANC Sign In**

**Other Big I States**

OR

**Create Account**

The image shows a 'Sign In' form with three main buttons: 'IIANC Sign In', 'Other Big I States', and 'Create Account'. The 'IIANC Sign In' button is highlighted with a red border. The 'Create Account' button is a light gray color, while the others are blue. The text 'OR' is centered between the 'Other Big I States' and 'Create Account' buttons.

**3. Once logged in, you will be taken to the webinar's landing page in the learning center.**

A sample webinar page in the learning center is shown below.

Courses » Shorelines and Safeguards: ... » **Shorelines and Safeguards: ...**

**Shorelines and Safeguards: Navigating Coastal Exposures in NC Insurance** ⓘ

View Report Schedule Emails Edit

End Event ▼ Zoom Meeting ⓘ

Overview ⓘ Resources +

DESCRIPTION

## Shorelines and Safeguards: Navigating Coastal Exposures in NC Insurance

**InsurAcademy Agent Development Webinar Series**

Exposures in NC Insurance Explore the nuances of Coastal Exposures in North Carolina's insurance landscape by joining our upcoming webinar. This session is tailored for insurance professionals seeking a comprehensive understanding of the unique challenges and opportunities associated with coastal regions. Our expert speakers will delve into topics such as risk assessment, mitigation strategies, and regulatory considerations specific to the coastal exposures prevalent in North Carolina. Gain valuable insights to navigate the complexities of insuring properties in coastal areas, ensuring you are well-equipped to address the distinctive aspects of this dynamic insurance environment. Don't miss this opportunity to enhance your knowledge and refine your approach to coastal exposures in the North Carolina insurance market.

**Speaker:** Charlotte Hicks, CPA, CIC, AAI, CWCA, ARM, President of Green Flash Marketing  
**Date:** Tuesday, March 24, 2026  
**Time:** 11:00 AM - 12:00 PM  
**CE Credits:** 1 Hour Flood Credit (NC Only)

**Have Questions?**  
Please reach out to the team at [Education@TheInsurAcademy.com](mailto:Education@TheInsurAcademy.com) or 919-755-0847.

Edit Description

CONTRIBUTORS

Add Existing Contributor ▼ Add A New Contributor

**March 24, 2026**

**Tue 11:00 AM EDT** ⓘ

**Audio Options:**

Use Your Computer

DURATION 1H 0M

**Join Live Web Event**

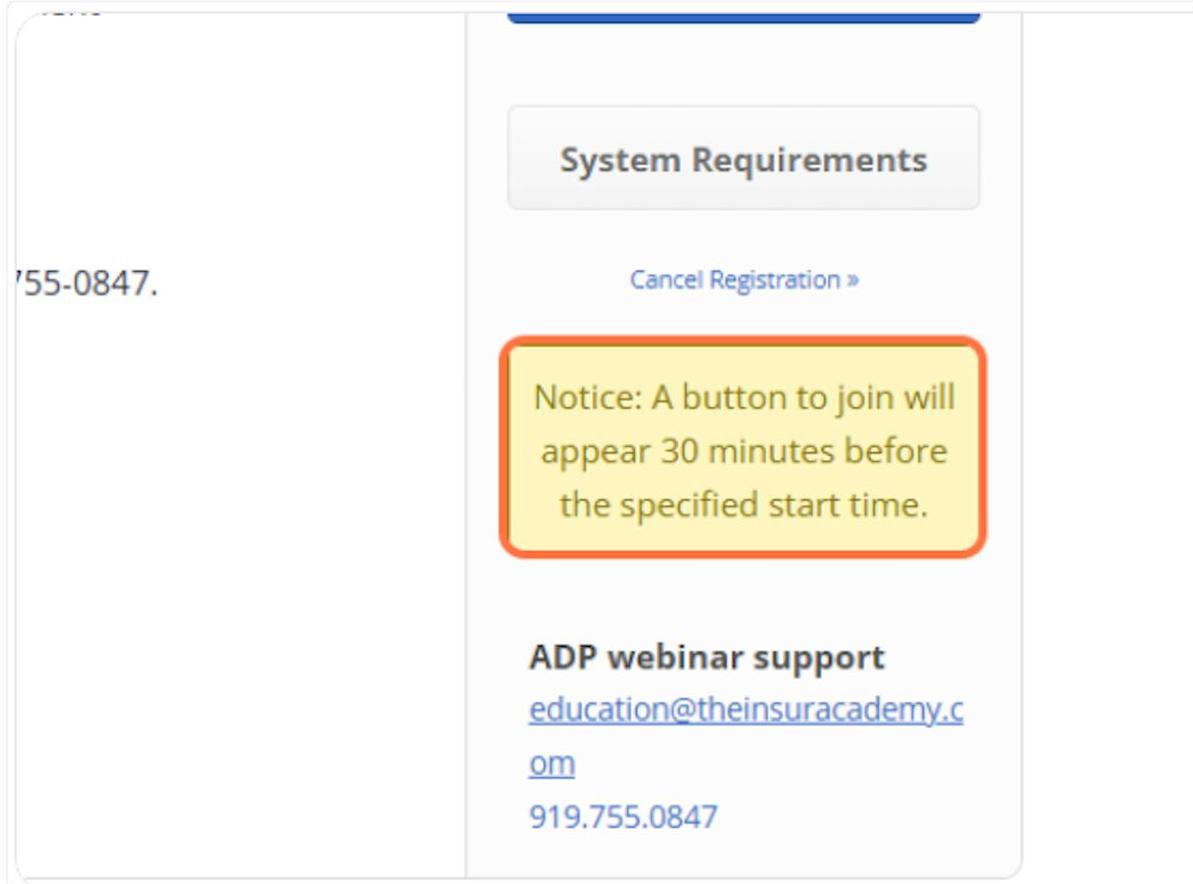
**System Requirements**

Cancel Registration +

**Notice:** A button to join will appear 30 minutes before the specified start time.

**ADP webinar support**  
[education@theinsuracademy.com](mailto:education@theinsuracademy.com)  
919.755.0847

4. A button titled "Join" will appear 30 minutes before the specified start time. When it is within 30 minutes of the webinar start time, click on Join to access the live webinar.



755-0847.

**System Requirements**

[Cancel Registration »](#)

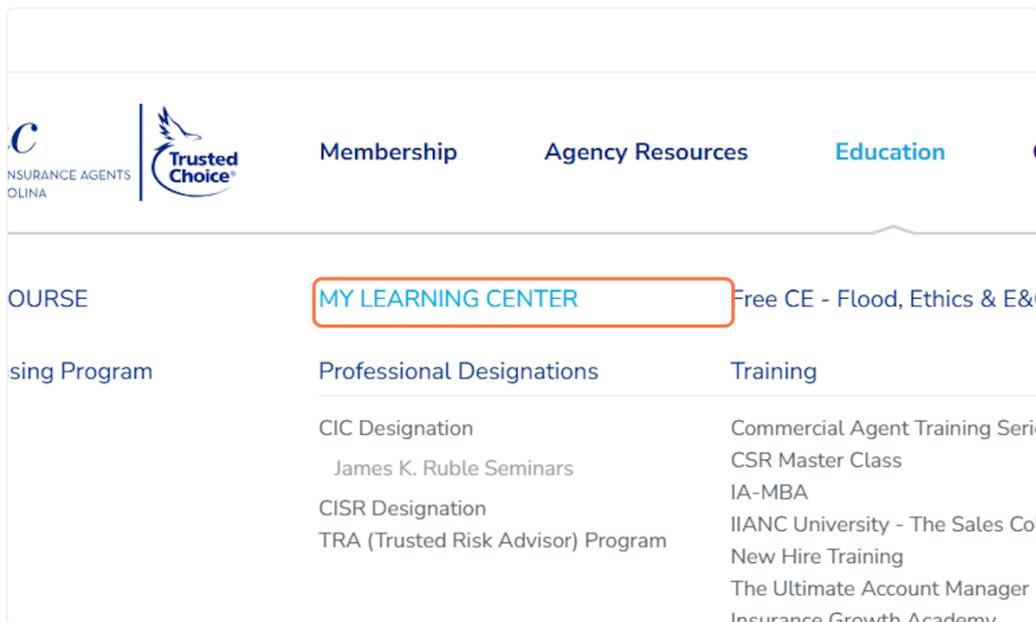
Notice: A button to join will appear 30 minutes before the specified start time.

**ADP webinar support**  
[education@theinsuracademy.com](mailto:education@theinsuracademy.com)  
919.755.0847

## How to Access Webinar Recordings

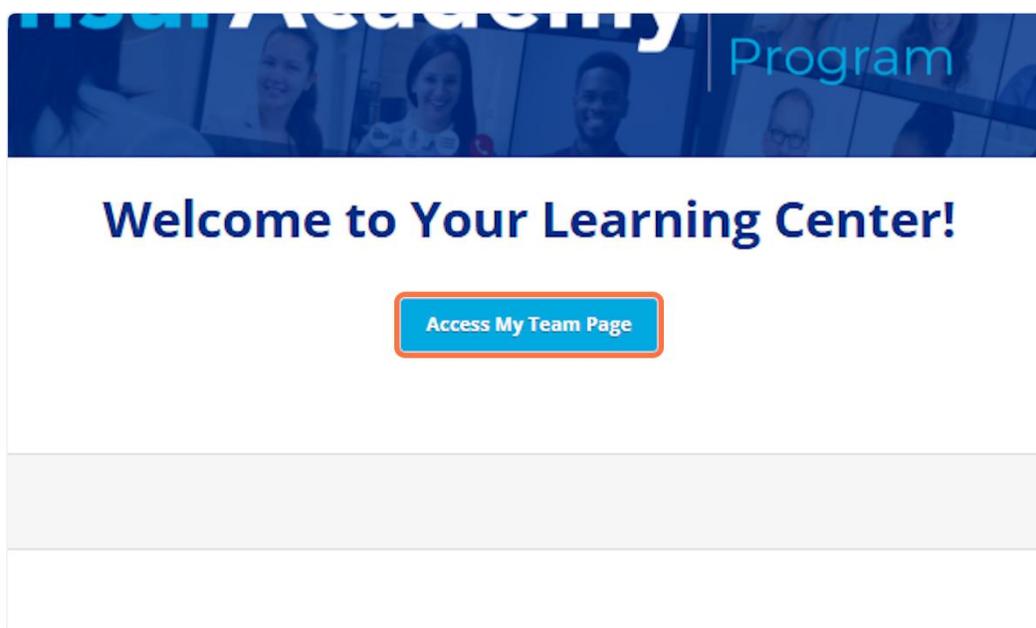
1. Navigate to this URL: <https://www.iianc.com/> and log in

2. Hover over Education in the main navigation menu and Click on MY LEARNING CENTER



The screenshot shows the top navigation bar of the IIANC website. On the left, there are logos for 'INSURANCE AGENTS OF ILLINOIS' and 'Trusted Choice'. The navigation menu includes 'Membership', 'Agency Resources', and 'Education'. The 'Education' menu is open, showing a dropdown list with 'MY LEARNING CENTER' highlighted in a red box. Other items in the dropdown include 'Free CE - Flood, Ethics & E&C', 'Insurance Growth Academy', 'Professional Designations', and 'Training'. Under 'Professional Designations', there are links for 'CIC Designation', 'James K. Ruble Seminars', 'CISR Designation', and 'TRA (Trusted Risk Advisor) Program'. Under 'Training', there are links for 'Commercial Agent Training Series', 'CSR Master Class', 'IA-MBA', 'IIANC University - The Sales College', 'New Hire Training', 'The Ultimate Account Manager', and 'Insurance Growth Academy'.

3. Click on Access My Team Page



The screenshot shows a banner for the 'Insurance Agency Success Program' with a blue background and images of people. Below the banner, the text 'Welcome to Your Learning Center!' is displayed in a large, bold, blue font. Below this text, a blue button with the text 'Access My Team Page' is highlighted with a red border.

4. Scroll down to ADP Webinar Series - Recordings for NC Audience below Agency Training

The screenshot shows the 'Agency Training' section of a web application. At the top, there is a grid of ten course categories, each with an icon and a label: CIC/Ruble, E&O, CISR, Ethics, Flood, Agency Development, InsurAcademy, Pre-Licensing, TRA, and PD Courses. Below this grid is the heading 'Agency Training' and a sub-heading 'Click below to access Courses your Agency has assigned to you'. Underneath is a filter dropdown menu set to 'Active'. A list of active courses is displayed, with the first item, 'ADP Webinar Series - Recordings for NC Audience', highlighted in yellow and outlined in red. The footer of the page contains links for 'Search', 'Support', and 'Sign Out', along with copyright information for Momentive Software Holdco, LLC and links for 'Privacy Policy' and 'Cookies'.

5. Click on ADP Webinar Series - Recordings for NC Audience

This screenshot is a zoomed-in view of the 'Agency Training' page, focusing on the course list. The heading 'Agency Train' is visible at the top right, with the sub-heading 'Click below to access Courses your Agency has assigned to you' below it. The 'Active' filter dropdown is shown. The course 'ADP Webinar Series - Recordings for NC Audience' is highlighted in yellow and outlined in red. The footer of the page shows links for 'Admin', 'Search', 'Support', and 'Sign Out', along with copyright information for Momentive Software Holdco, LLC.

## 6. Here are all the webinar recordings for you to enjoy.

Admin Test Team Sandbox-LB Search...

Courses » ADP Webinar Series - Record...

### ADP Webinar Series - Recordings for NC Audience

Edit

**Couldn't join us live? Here are all the webinar recordings for you to enjoy**

Please be advised that CE credits are only awarded for LIVE webinar attendance.

Edit Description

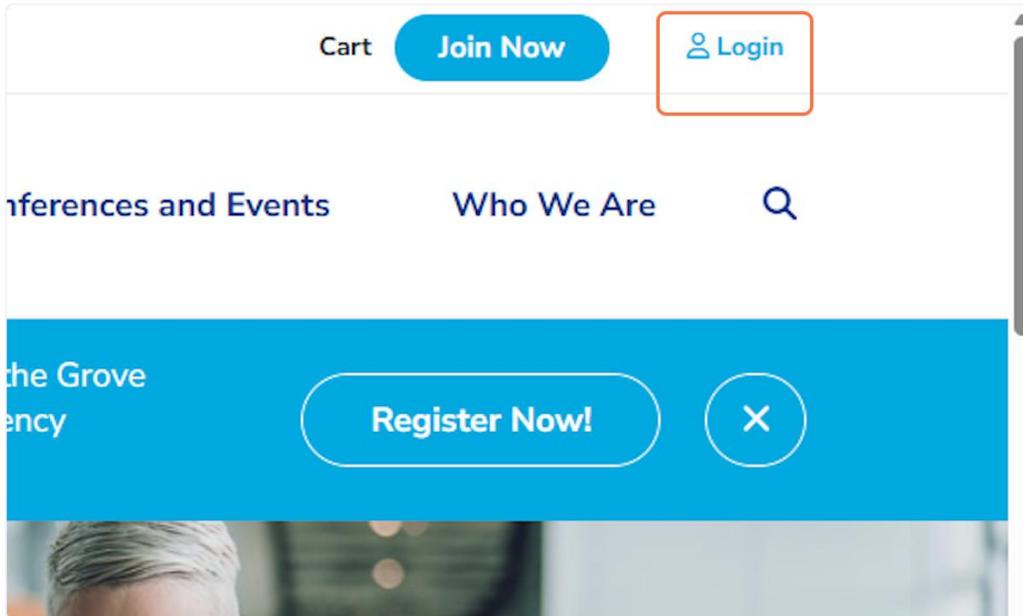
SECTION LINK DOCUMENT PRESENTATION SCORM ASSIGNMENT ASSESSMENT CERTIFICATE SURVEY LIVE EVENT

- Stand Out and Thrive - 02-03-2026**  
Presentation: 55 min 42 sec  
Default Group NC\_ADP NC Universities
- Shorelines and Safeguards: Mitigating Risks - 01/27/26**  
Presentation: 55 min 29 sec  
Default Group NC\_ADP NC Universities
- Insights Into the Duty to Advise: Legal Standards and E&O Risk Reduction - 01/14/26**  
Presentation: 42 min 18 sec  
Default Group NC\_ADP NC Universities

## How To View Progress and Activity

1. Log in using this URL: <https://learning.iianc.com/>

2. Click on Login



3. Enter your Username and Password

 A screenshot of the iianc.com login and registration page. The page header includes the iianc logo (Independent Insurance Agents of North Carolina), the Trusted Choice logo, and the InsurAcademy Agent Development Program logo. The page is divided into two main sections: 'Have an account?' and 'Don't have an account?'. The 'Have an account?' section has a 'Sign in below' heading and two input fields: 'Username or Email Address \*' (containing 'lburke@iianc.com') and 'Password \*' (masked with dots). There is a checkbox for 'Keep me signed in if I close the browser' and a blue 'Sign In' button. The 'Don't have an account?' section has a 'Create a new user account below' heading and four input fields: 'First Name \*', 'Last Name \*', 'Email Address \*', and 'Create Password \*' (with a 'Confirm' field next to it). There is also a 'Business Phone' field with a dropdown for country code and a 'Confirm' field next to it. At the bottom, there is an 'Agency/Company Name \*' field. A 'Sign In Help' section is located at the bottom left, with the text 'Do you need help signing into our site?' and a link 'Find my account by email address'.

#### 4. Click on Sign In

Password \*

.....

Keep me signed in if I close the browser

[Sign In](#)

## Sign In Help

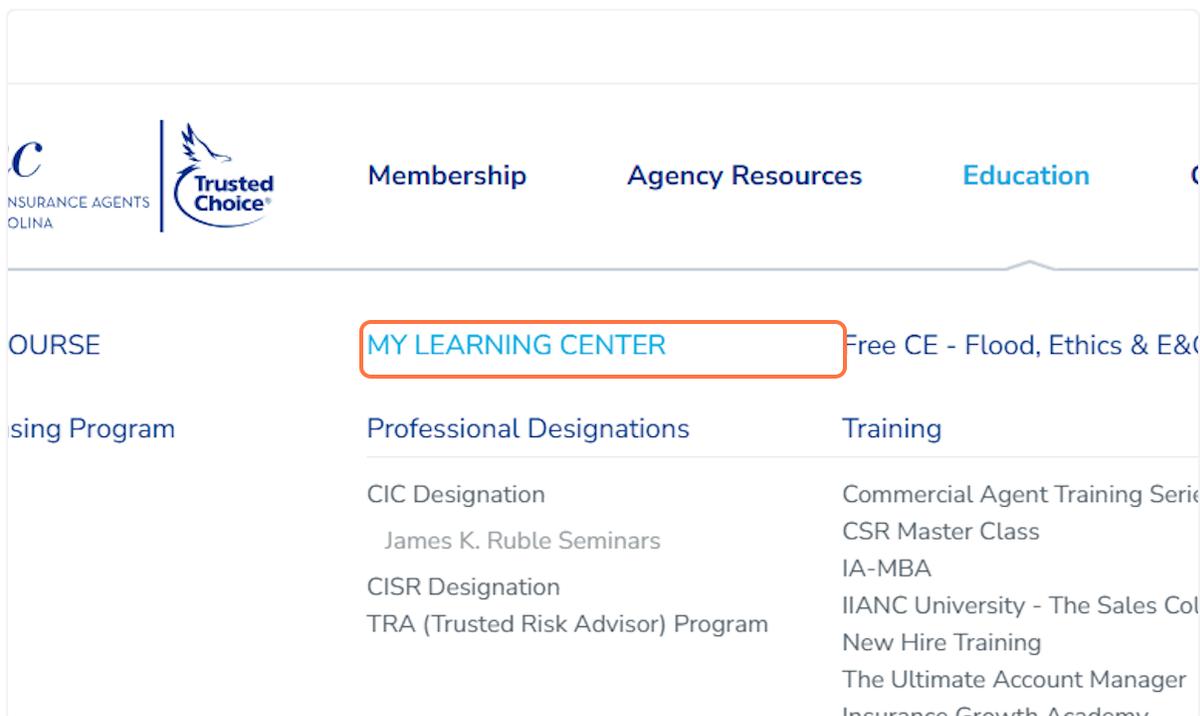
Do you need help signing into our site?

#### 5. Hover over Education on the main navigation to open the menu

Cart [Join Now](#) V

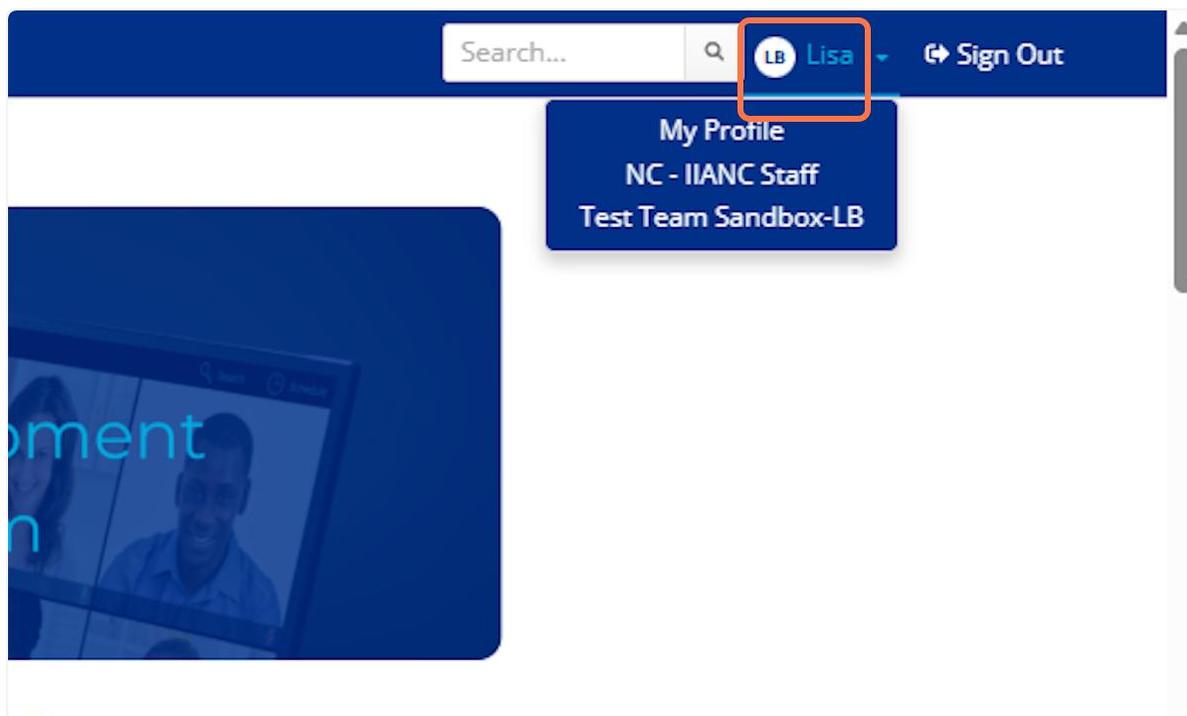
Agency Resources **Education** Conferences and Events

|                                |   |                   |
|--------------------------------|---|-------------------|
| LEARNING CENTER                | Free CE - Flood, Ethics & E&O           | Online Learning   |
| License Designations           | Training                                | InsurAcademy      |
| Continuing Education           | Commercial Agent Training Series        | Agent Development |
| Webinars                       | CSR Master Class                        | Mentor Program    |
| Education                      | IA-MBA                                  |                   |
| Insurance Risk Advisor Program | IIANC University - The Sales Collective |                   |

**6. Click on MY LEARNING CENTER**

The screenshot shows the top navigation bar of the Insurance Agents of North Carolina website. The logo for "INSURANCE AGENTS OF NORTH CAROLINA" and "Trusted Choice" is on the left. The navigation menu includes "Membership", "Agency Resources", and "Education". The "Education" menu is expanded, showing "MY LEARNING CENTER" highlighted with a red box. Other items in the "Education" menu include "Free CE - Flood, Ethics & E&C", "Continuing Education", "Professional Designations", and "Training".

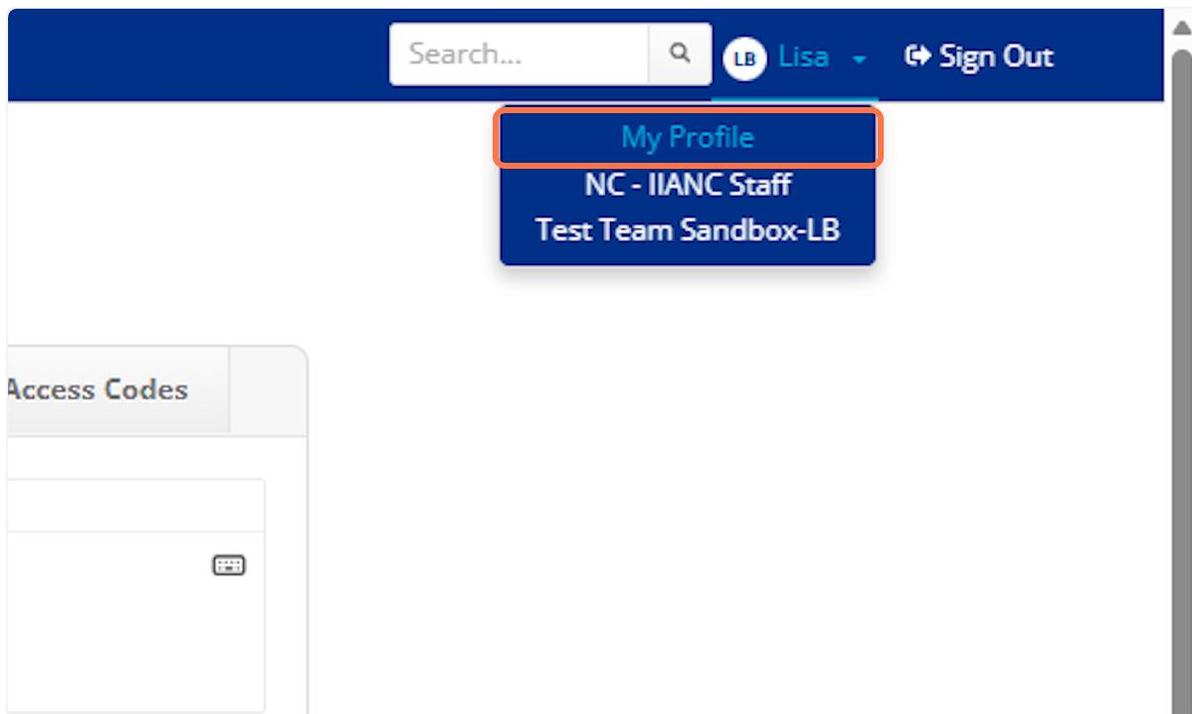
- INSURANCE AGENTS OF NORTH CAROLINA
- Trusted Choice
- Membership
- Agency Resources
- Education
  - MY LEARNING CENTER
  - Free CE - Flood, Ethics & E&C
  - Continuing Education
  - Professional Designations
    - CIC Designation
    - James K. Ruble Seminars
    - CISR Designation
    - TRA (Trusted Risk Advisor) Program
  - Training
    - Commercial Agent Training Series
    - CSR Master Class
    - IA-MBA
    - IIANC University - The Sales College
    - New Hire Training
    - The Ultimate Account Manager
    - Insurance Growth Academy

**7. Click on your username in the upper right of your Learning Center landing page**

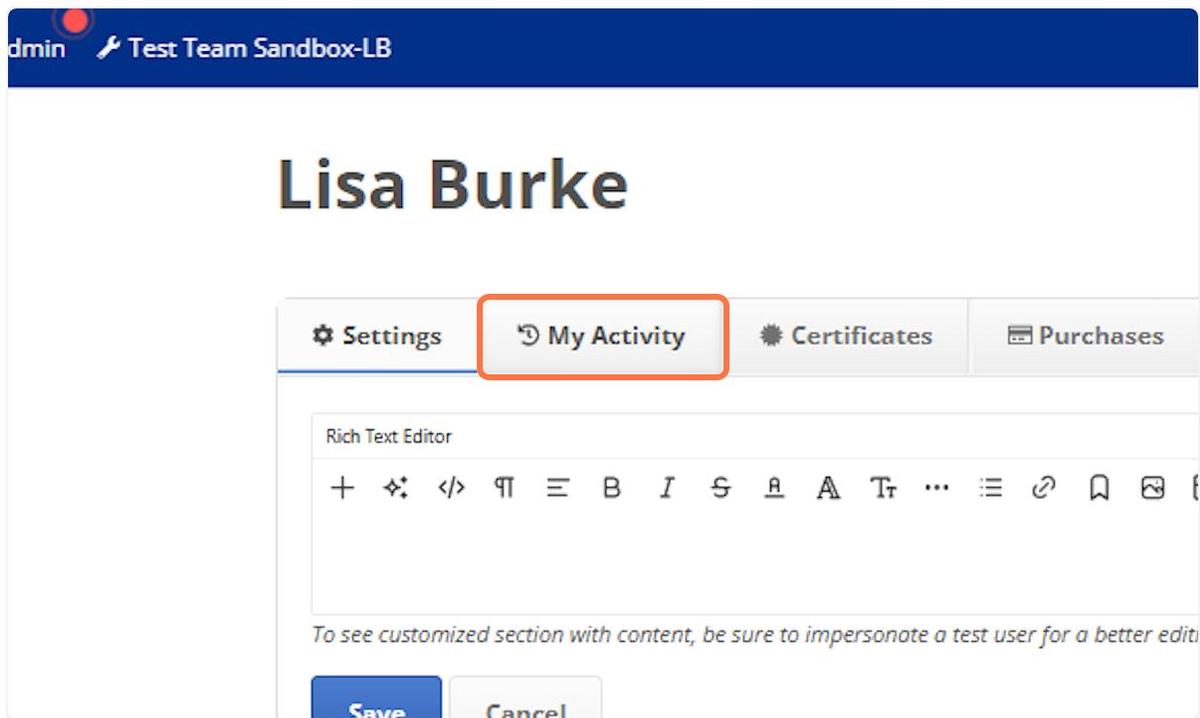
The screenshot shows the user interface of the Learning Center landing page. The top navigation bar is dark blue and contains a search bar, a user profile icon with the initials "LB" and the name "Lisa", and a "Sign Out" button. The user profile icon is highlighted with a red box. A dropdown menu is open below the profile icon, showing "My Profile", "NC - IIANC Staff", and "Test Team Sandbox-LB".

- Search...
- LB Lisa
- Sign Out
- My Profile
- NC - IIANC Staff
- Test Team Sandbox-LB

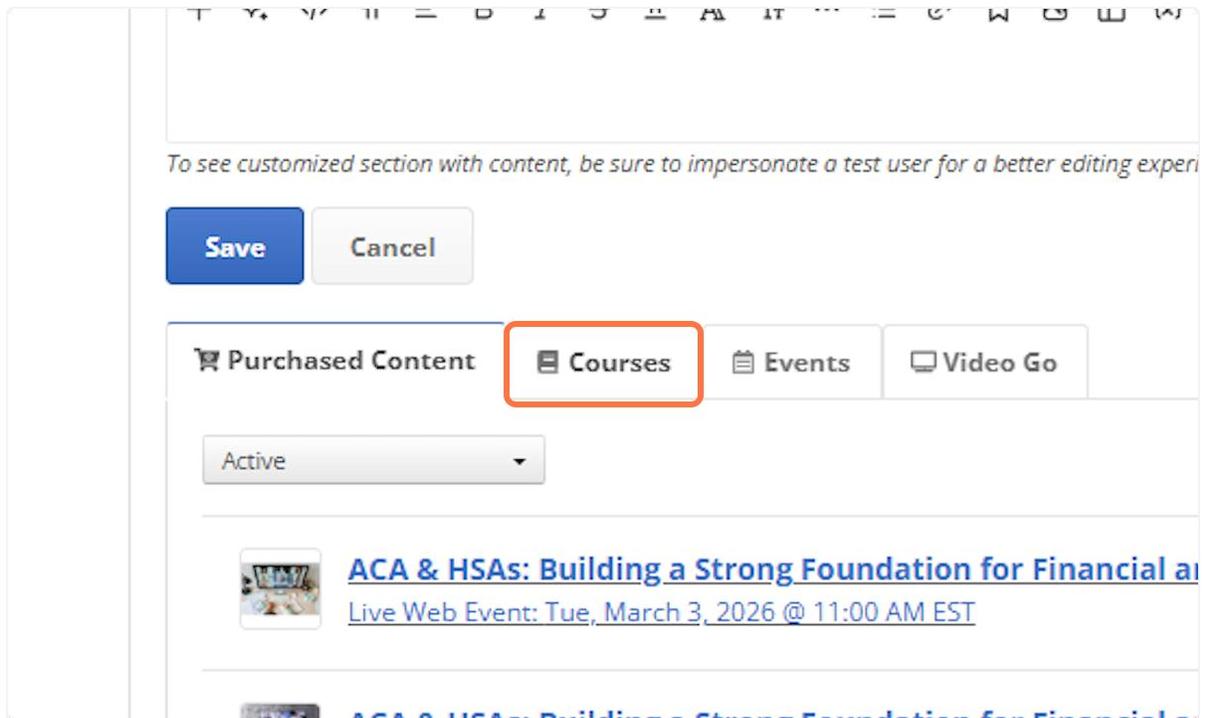
## 8. Click on My Profile



## 9. Click on My Activity

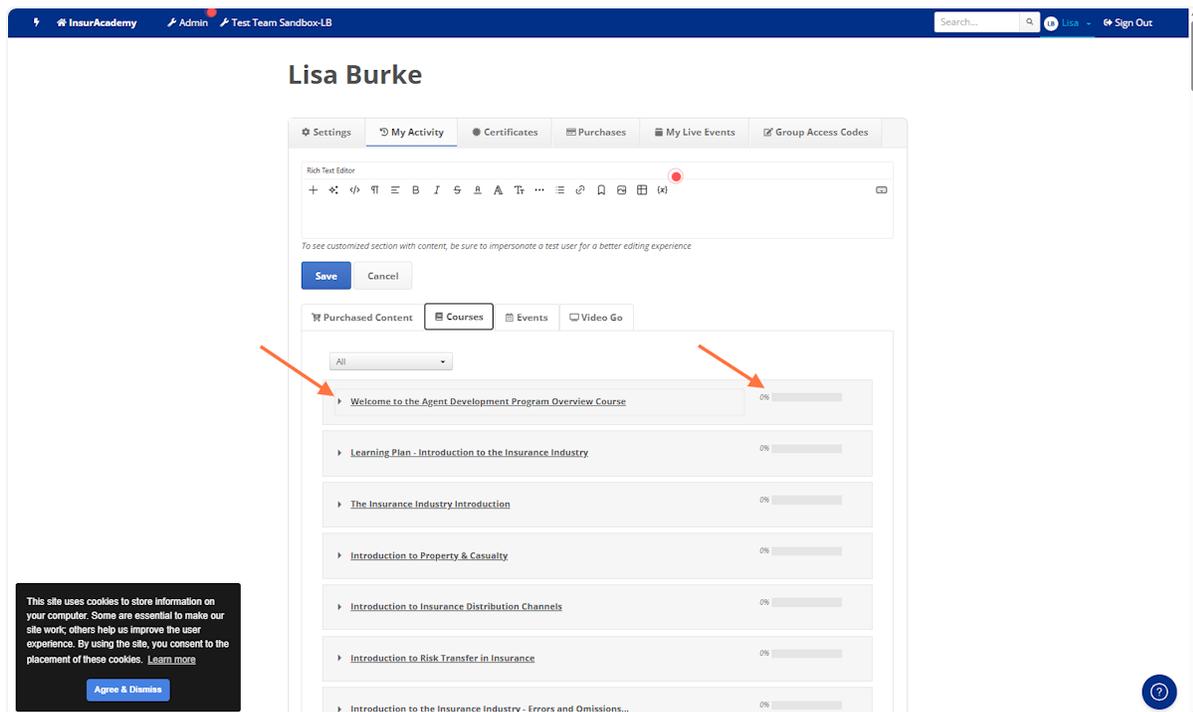


## 10. Click on Courses



The screenshot shows a rich text editor at the top with a toolbar and a 'Save' button. Below the editor is a message: "To see customized section with content, be sure to impersonate a test user for a better editing experi". Underneath are 'Save' and 'Cancel' buttons. A navigation bar contains 'Purchased Content', 'Courses' (highlighted with an orange box), 'Events', and 'Video Go'. Below the navigation bar is a dropdown menu set to 'Active'. The main content area displays a course card for "ACA & HSAs: Building a Strong Foundation for Financial a" with a sub-heading "Live Web Event: Tue, March 3, 2026 @ 11:00 AM EST".

## 11. This screen will show the activity and progress of the courses in your Learning Center.



The screenshot shows the user profile for Lisa Burke. The navigation tabs include 'Settings', 'My Activity', 'Certificates', 'Purchases', 'My Live Events', and 'Group Access Codes'. The 'My Activity' tab is active, displaying a rich text editor and a message: "To see customized section with content, be sure to impersonate a test user for a better editing experience". Below the editor are 'Save' and 'Cancel' buttons. A navigation bar contains 'Purchased Content', 'Courses' (highlighted with an orange box), 'Events', and 'Video Go'. Below the navigation bar is a dropdown menu set to 'All'. The main content area displays a list of courses with progress bars:

- Welcome to the Agent Development Program Overview Course (0%)
- Learning Plan - Introduction to the Insurance Industry (0%)
- The Insurance Industry Introduction (0%)
- Introduction to Property & Casualty (0%)
- Introduction to Insurance Distribution Channels (0%)
- Introduction to Risk Transfer in Insurance (0%)
- Introduction to the Insurance Industry - Errors and Omissions... (0%)

Two orange arrows point to the first two course entries. A cookie consent banner is visible at the bottom left, and a search icon is at the bottom right.

## 12. Click on caret beside a course title to View all items in this Course

To see customized section with content, be sure to impersonate a test user for a better editing experience

[Save](#) [Cancel](#)

[Purchased Content](#) [Courses](#) [Events](#) [Video Go](#)

All

▼ Welcome to the Agent Development Program Overview Course 0%

| Name                               | Credits | Completed at | My Progress |
|------------------------------------|---------|--------------|-------------|
| Agent Development Program Overview |         |              | 0%          |
| ADP Course Survey                  |         |              | 0%          |

[View all items in this Course >](#)

▶ [Learning Plan - Introduction to the Insurance Industry](#) 0%

▶ [The Insurance Industry Introduction](#) 0%

▶ [Introduction to Property & Casualty](#) 0%

cookies to store information on  
Some are essential to make our  
s help us improve the user  
using the site, you consent to the  
ese cookies. [Learn more](#)

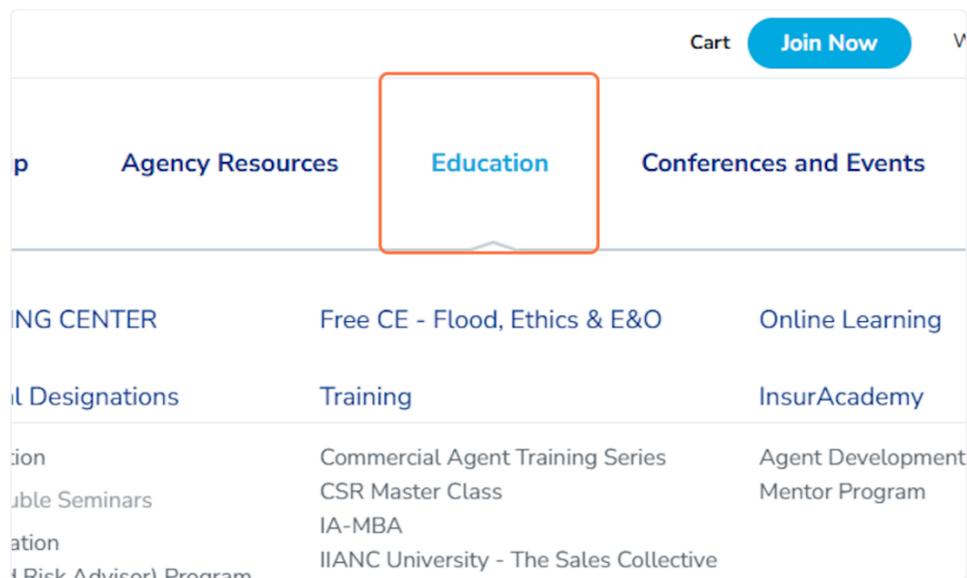
[Agree & Dismiss](#)

## How to Add Users

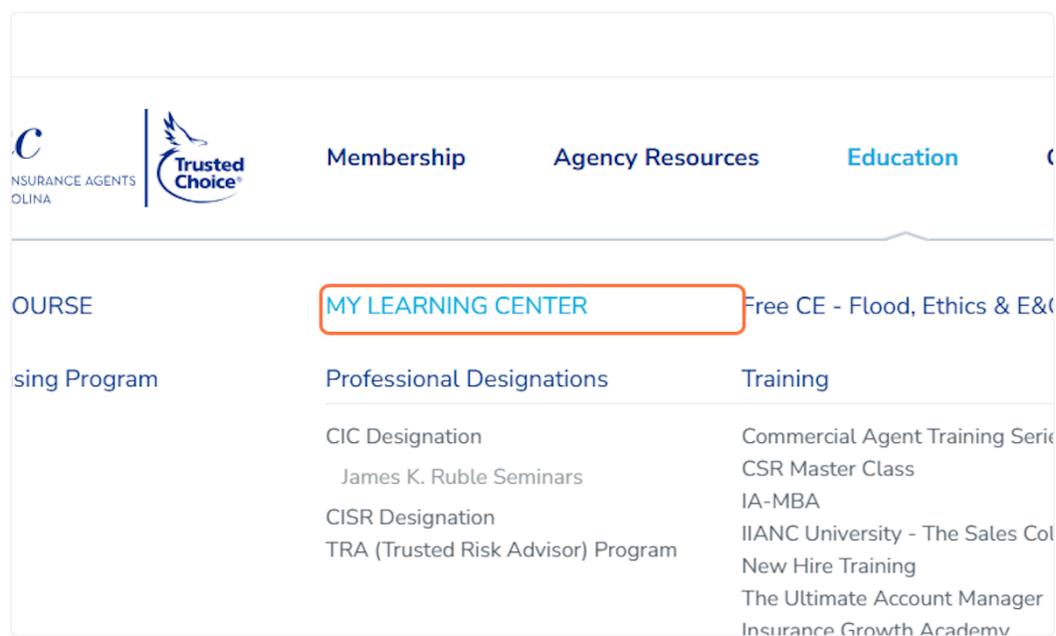
These steps show how to add users to your Team in the Learning Center.

1. Navigate to this URL: <https://www.iianc.com/> and log in

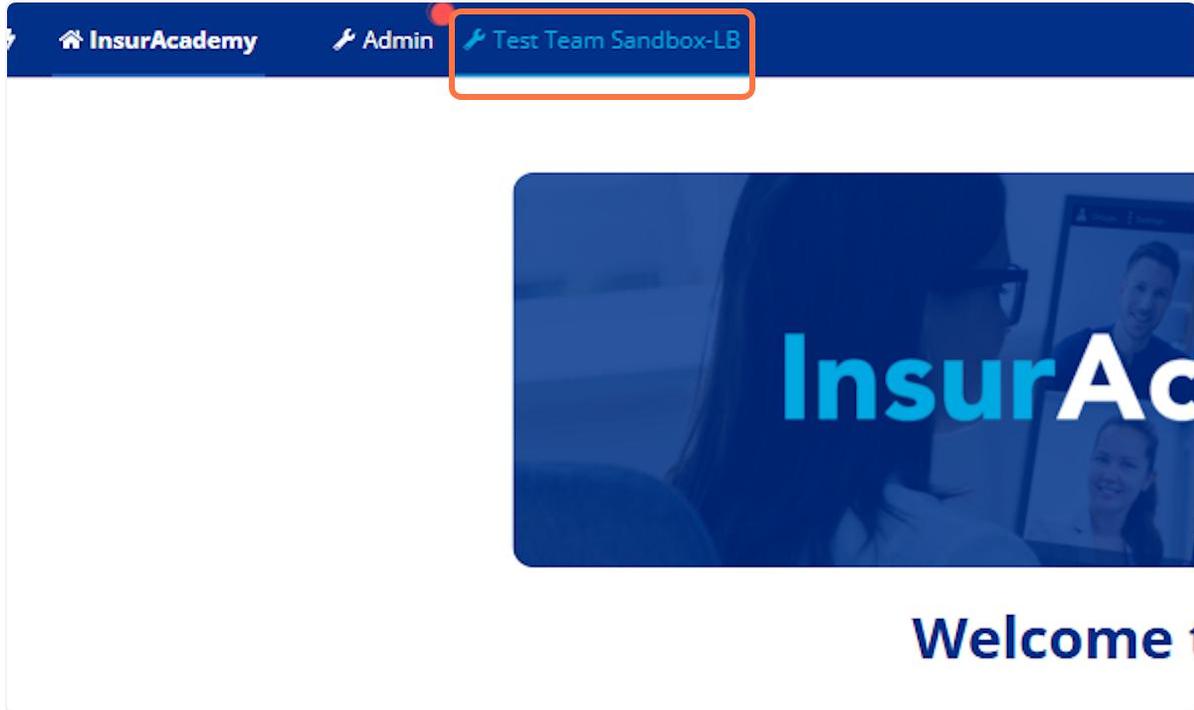
2. Hover over Education



3. Click on MY LEARNING CENTER

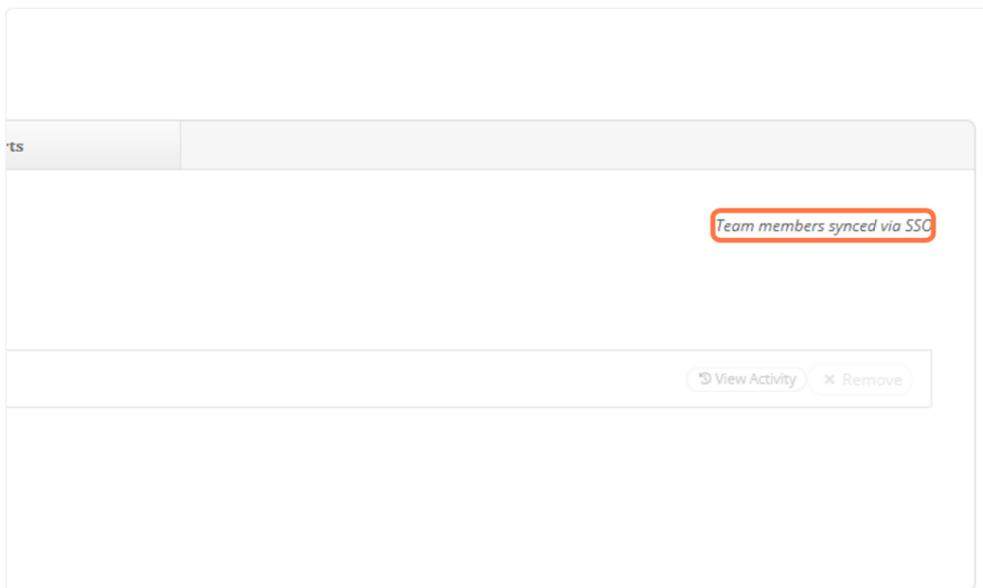


4. On the Learning Center's landing page, Click on your agency's name next to the wrench at the top left



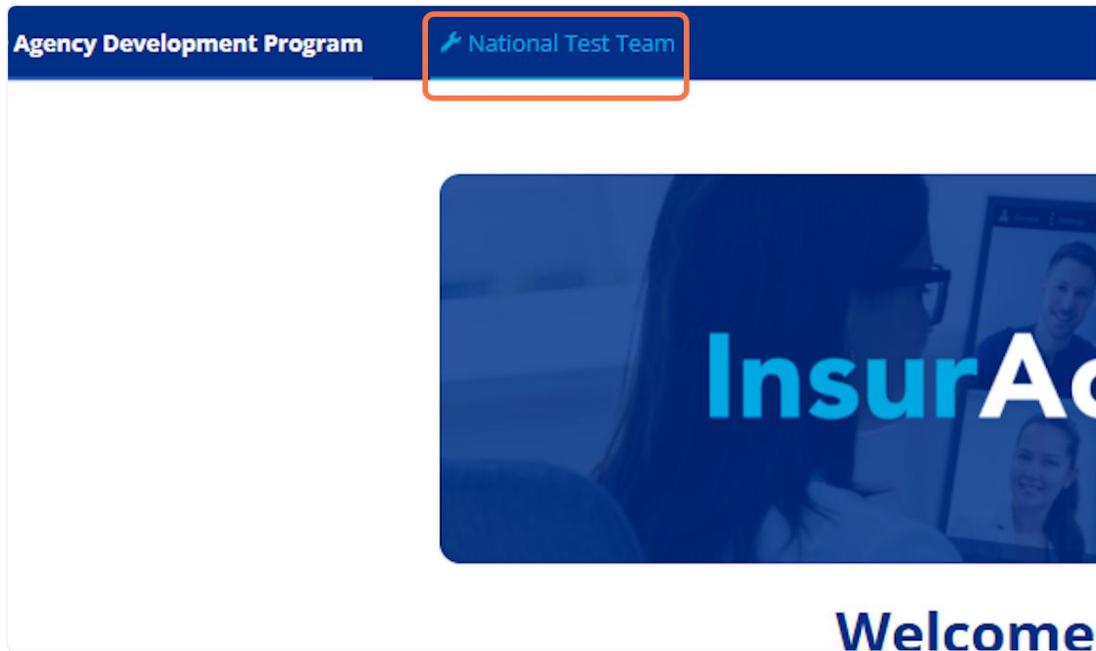
5. You'll notice a message that says, "Team members synced via SSO." This tells us that agents at your agency or branch will automatically get added to your team when they log into their Learning Center.

No additional action is needed by the Team Manager.



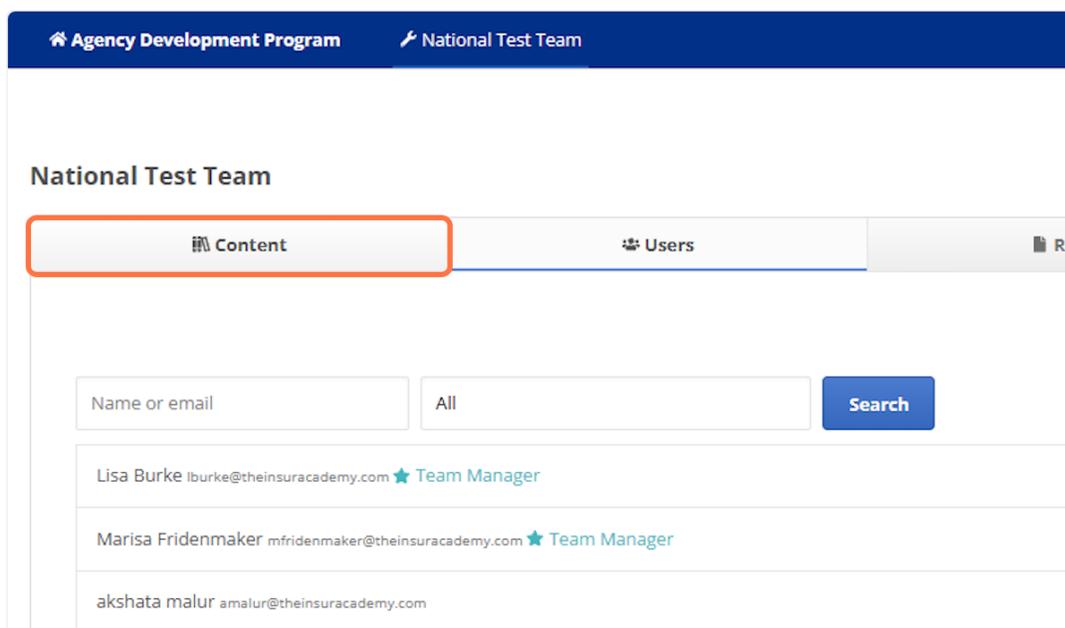
## How to Assign Content to Team Members

### 1. Click on your team's name in the main navigation



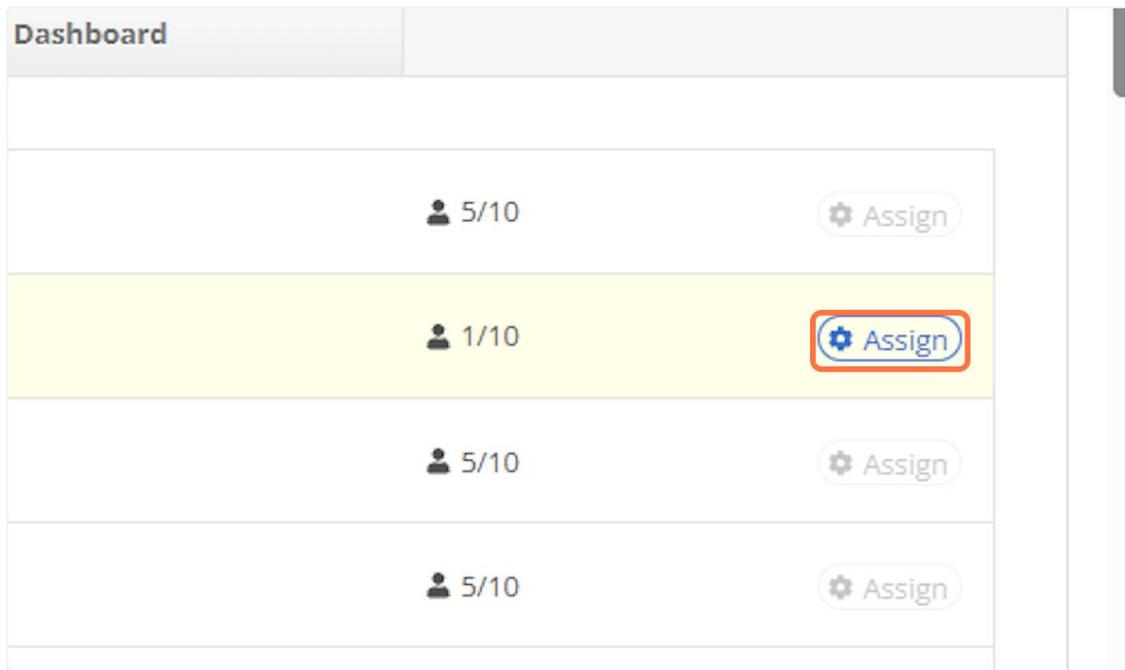
### 2. Click on Content

The Team Manager area contains four primary tabs: Content, Users, Reports, and Dashboard. Select Content.



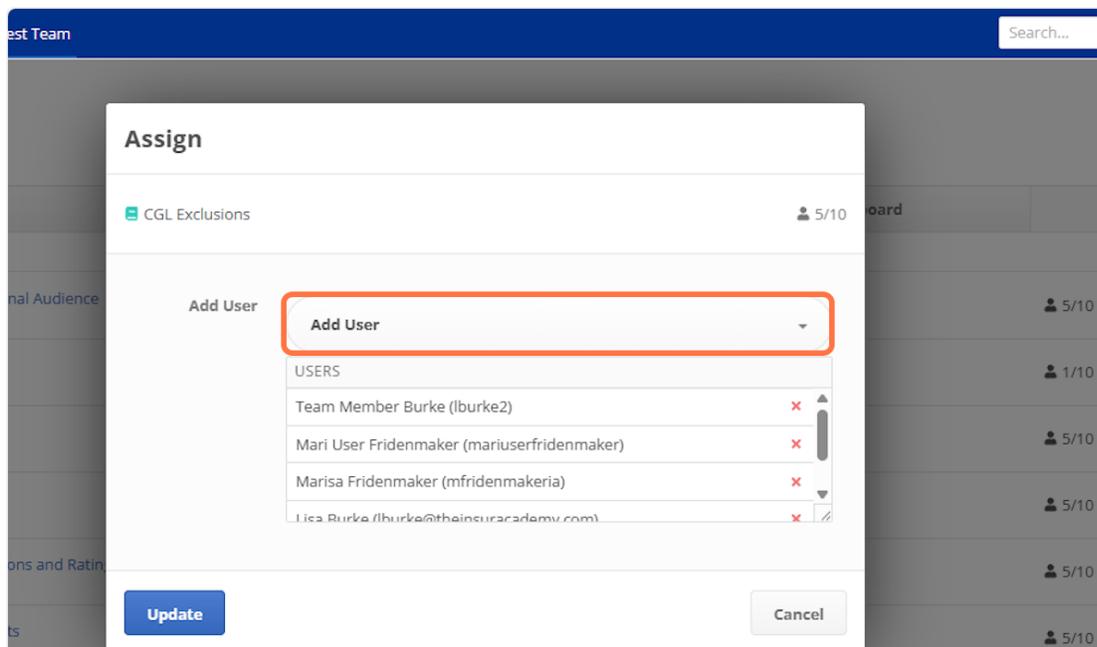
### 3. Click on Assign

Choose the content you want to assign to your team member(s) and click Assign



### 4. Click on Add User

If your team members aren't listed, click on Add User to find and select team members to assign to this item.



5. Click on the x beside any team member's name you wish to remove from the assignment list.

The screenshot shows a modal window titled "Assign" for "CGL Exclusions" with a user count of 5/10. It includes an "Add User" dropdown menu. The dropdown list contains three users: "Team Member Burke (lburke2)", "akshata malur (amalur@theinsuracademy.com)", and "Holley S (cinnamonbread)". The user "akshata malur" is highlighted with a red border. There are "Update" and "Cancel" buttons at the bottom of the modal.

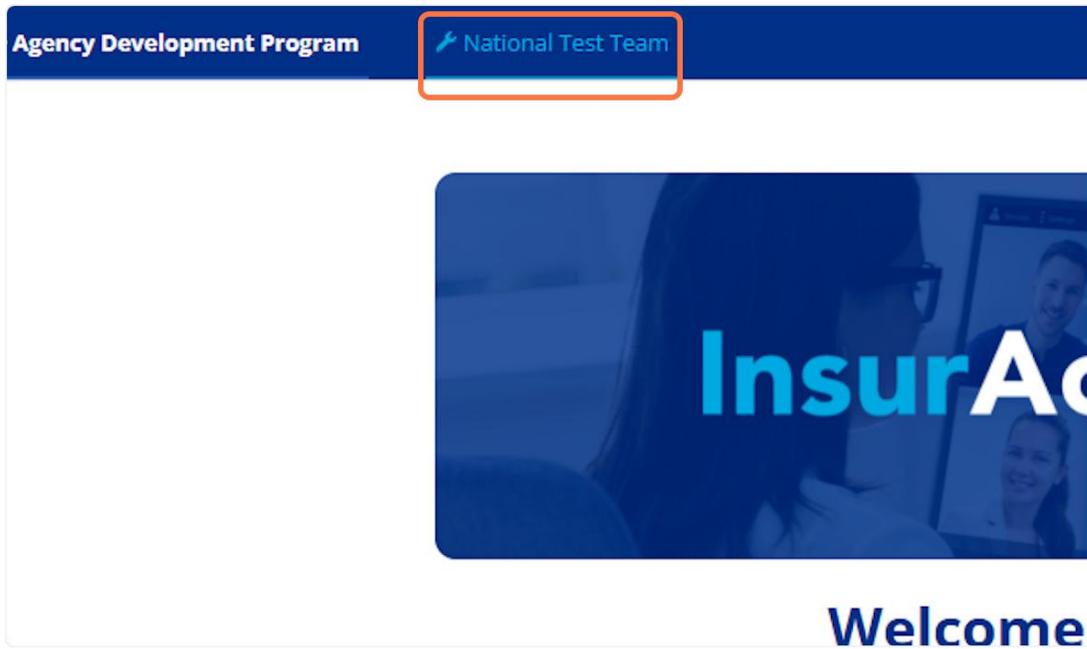
6. Click on Update

Click Update to confirm. Once updated, team members will be able to access this item immediately.

The screenshot shows a blue "Update" button with a red border, positioned over a list of items. The list includes "Completed Operations", "Declarations, Classifications and Rating", "Liability Core Concepts", "ty Basics", and "ty Basics: COPE Underwriting".

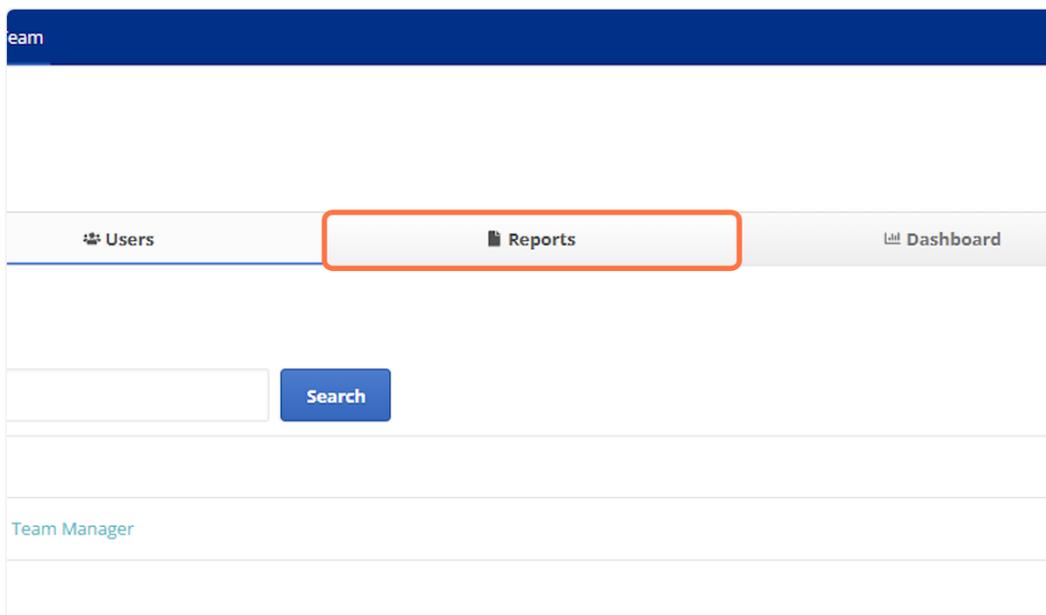
## How to Generate Reports

### 1. Click on your team name in the main navigation



### 2. Click on Reports

The Team Manager area contains four primary tabs: Content, Users, Reports, and Dashboard. Click on Reports.



### 3. Select a report type

National Test Team

Content Users Reports Dashboard

Last 30 days 2025-12-29 2026-01-28 Reload Reports

Users Events Event Presentations Courses Course Presentations Links Documents Assessments Surveys Live Web Events In-Person Events Certificates All Items Credits Completed Certified Credits SCORM Assignments Recent Exports

150

### 4. Click on dropdown to filter reports by date

Date ranges include Last 30 Days, This Year, All-Time, and Custom date range.

Users Reports

Last 30 days 2025-12-29 2026-01-28

Courses Course Presentations Links Documents Assessments Surveys Live Web Events In-Person Events C

Username UID First Name Last Name Registration Date First I

5. Click on Reload Reports to apply filter and view changes.

The screenshot shows the 'Reports' section of a dashboard. At the top, there is a 'Reports' tab. Below it, there are two date range input fields: '2025-12-29' and '2026-01-28'. A prominent orange button labeled 'Reload Reports' is highlighted with a red border. A black callout box with white text points to this button, stating: 'Choose your date range to the left, then click this button to reload the reports'. Below the date fields, there is a horizontal menu with several tabs: 'Live Web Events', 'In-Person Events', 'Certificates', 'All Items', 'Credits Completed', 'Certified Credits', and 'SCORM'. To the right of these tabs is a search box labeled 'Search'. At the bottom of the interface, there is a row of filter options: 'Registration Date', 'First Login', 'Last Login', 'Last Active', and 'Assessments', each with a dropdown arrow.

6. Search within a report

To search for a specific team member or content item, use the search box.

The screenshot shows the 'Reports' section of a dashboard. At the top, there is a 'Reports' tab. Below it, there is a horizontal menu with several tabs: 'Items', 'Credits Completed', 'Certified Credits', 'SCORM', 'Assignments', and 'Recent Exports'. Below these tabs, there is a search box labeled 'Search' with a magnifying glass icon, which is highlighted with a red border. To the right of the search box is a blue button labeled 'Export'. At the bottom of the interface, there is a row of filter options: 'Status', 'Average Rating', and 'Ratings count', each with a dropdown arrow.

### 7. Click the blue caret to drill down within reports

Click the blue caret icon next to a value within the report to view the associated drill down report.

Show past events  Show Archived

| ie                               | Start Date | Start Time   | Registrants | Max Registrations | Live At |
|----------------------------------|------------|--------------|-------------|-------------------|---------|
| d Out<br>Thrive                  | 02/03/26   | 11:00 AM EST | 6 ▶         | 100               | 0 ▶     |
| &<br>:<br>ling a<br>ng<br>dation | 03/03/26   | 11:00 AM EST | 6 ▶         | 100               | 0 ▶     |

### 8. Click on Export

You can export any report by clicking the Export button.

Credits Completed Certified Credits SCORM Assignments Recent Exports

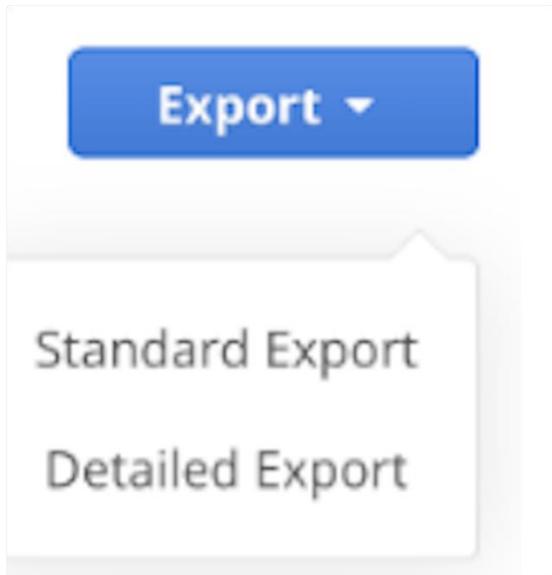
Search

Filtered to show activity between

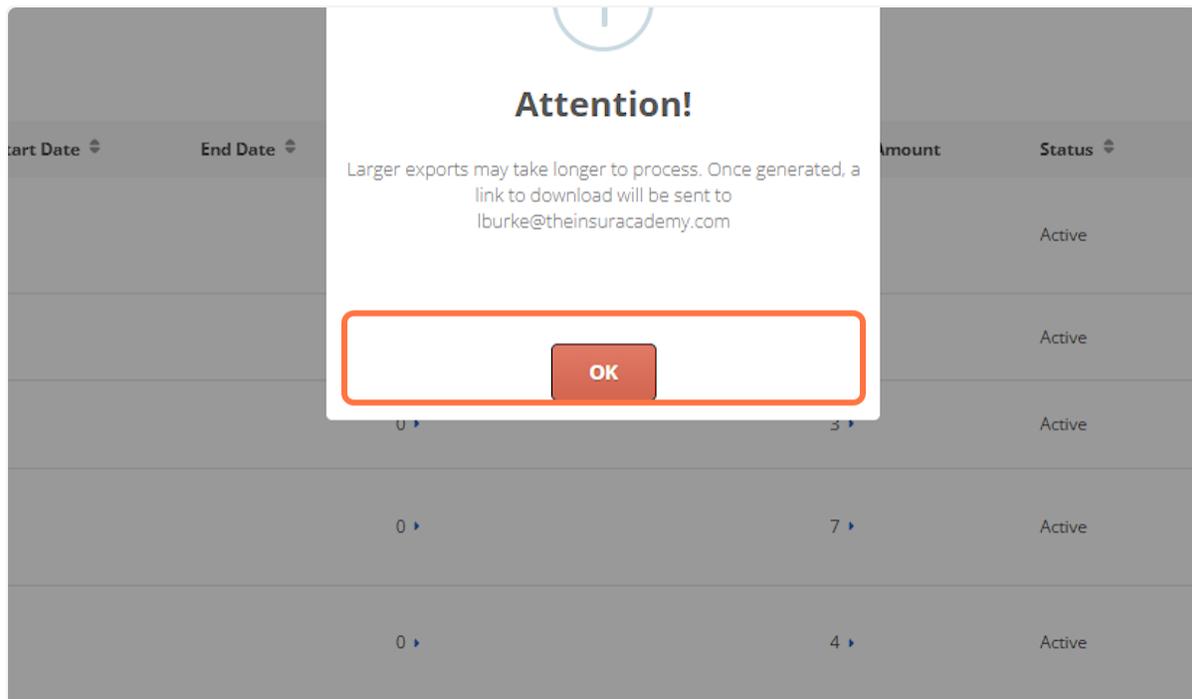
| in  | Last Active     | Assessments Passed | Assessments Failed | Certific |
|-----|-----------------|--------------------|--------------------|----------|
| :32 | 1/14/26 3:32 PM | 0                  | 0                  | 0        |

## 9. Detailed Exports is an option for some reports

Detailed exports are available for certain types of reports. Detailed exports contain more information such as a breakdown of individual user items completed or certificates completed. This option is useful if you need a closer look at team member progress.

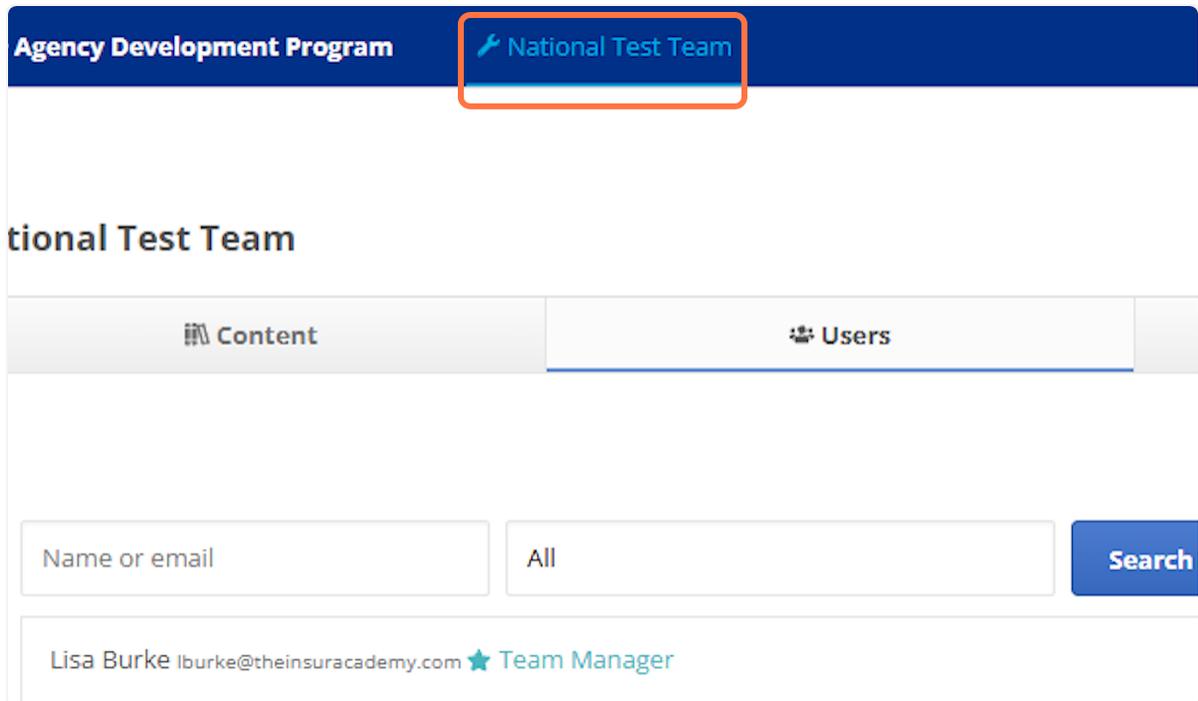


## 10. Click on OK



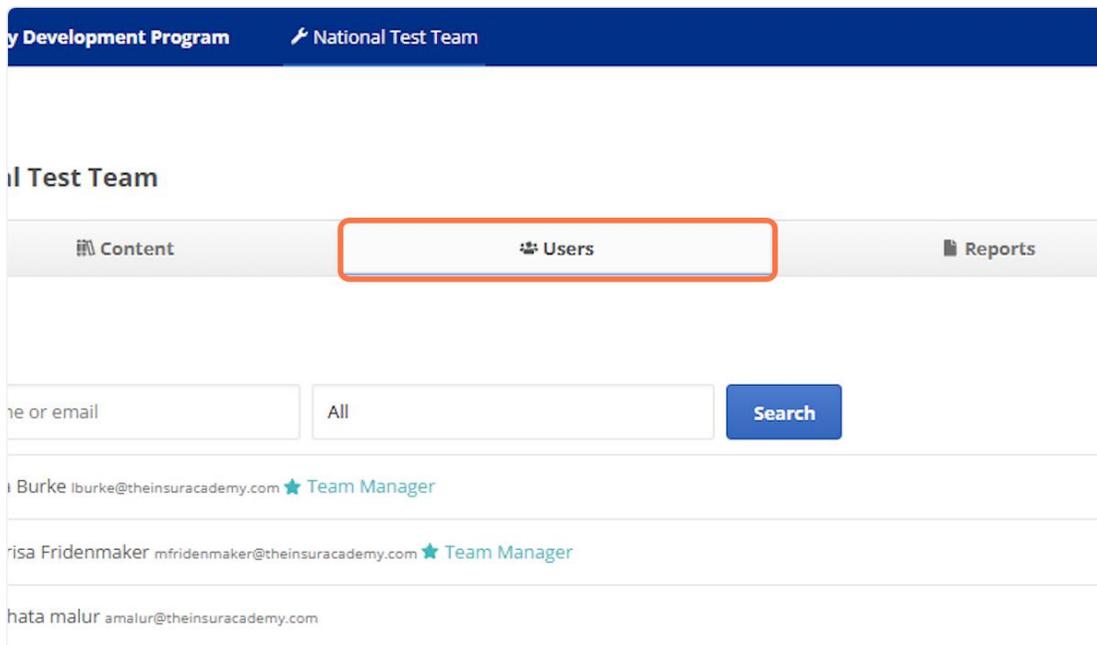
## How to View User Activity

### 1. Click on your team name in the main navigation



The screenshot shows the top navigation bar of the Agency Development Program. The "National Test Team" link is highlighted with an orange box. Below the navigation bar, the "National Test Team" title is visible. A tabbed interface shows "Content" and "Users" tabs, with "Users" being the active tab. Below the tabs, there is a search bar with the text "Name or email" and a dropdown menu set to "All". A "Search" button is located to the right of the search bar. Below the search bar, a list of users is displayed, with the first entry being "Lisa Burke |burke@theinsuracademy.com" and a "Team Manager" status.

### 2. Click on Users



The screenshot shows the top navigation bar of the Agency Development Program. The "National Test Team" link is highlighted with an orange box. Below the navigation bar, the "National Test Team" title is visible. A tabbed interface shows "Content", "Users", and "Reports" tabs, with "Users" being the active tab. Below the tabs, there is a search bar with the text "Name or email" and a dropdown menu set to "All". A "Search" button is located to the right of the search bar. Below the search bar, a list of users is displayed, with the first entry being "Lisa Burke |burke@theinsuracademy.com" and a "Team Manager" status. The second entry is "Lisa Fridenmaker |mfridenmaker@theinsuracademy.com" and a "Team Manager" status. The third entry is "Amanda Malur |amalur@theinsuracademy.com".

### 3. Click on View Activity

|  |                               |   |
|--|-------------------------------|---|
|  |                               |   |
|  |                               | <a href="#">View Activity</a> <a href="#">Remove</a>      |
|  |                               | <a href="#">View Activity</a> <a href="#">Remove</a>      |
|  |                               | <a href="#">View Activity</a> <a href="#">Remove</a>      |
|  | <i>Invite sent 01/27/2026</i> | <a href="#">Resend team invite</a> <a href="#">Remove</a> |
|  |                               | <a href="#">View Activity</a> <a href="#">Remove</a>      |

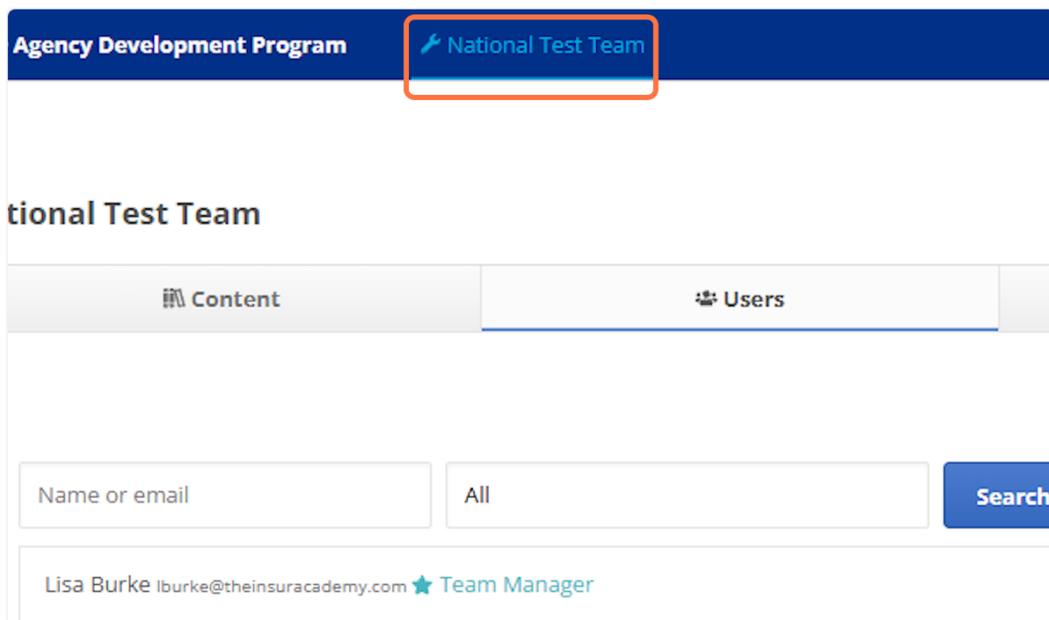
### 4. Select an Activity tab

|                     |         |                |        |          |                 |                  |
|---------------------|---------|----------------|--------|----------|-----------------|------------------|
| <b>Certificates</b> | Courses | Learning Paths | Events | Video Go | Live Web Events | In-Person Events |
|---------------------|---------|----------------|--------|----------|-----------------|------------------|

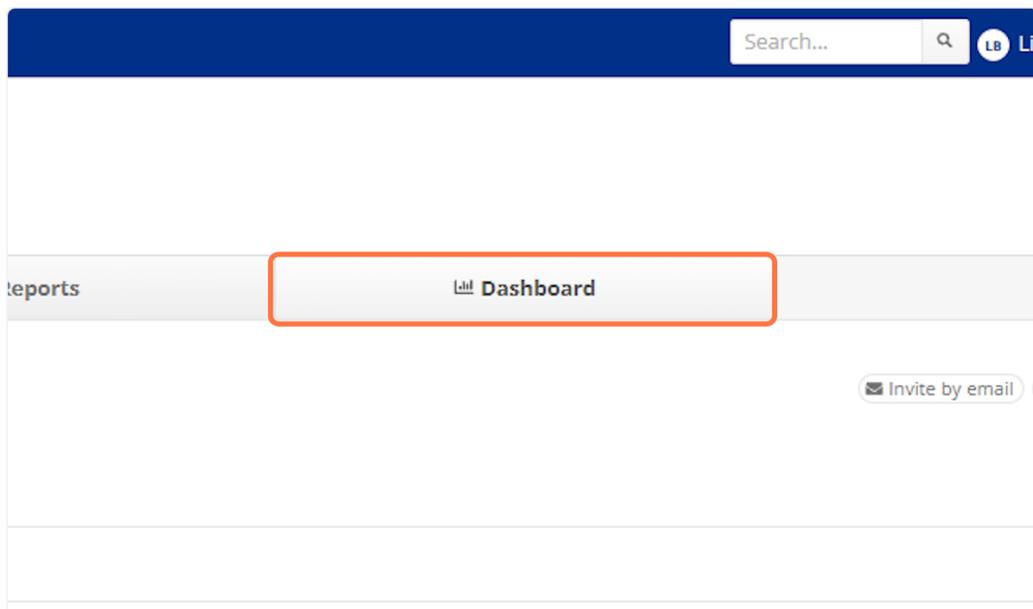
## How to Use Teams Dashboards

Teams dashboards will show the same data as seen in the reports. These charts simply give you more interactive tools to visualize and analyze team member and content data.

### 1. Click on your team name in the main navigation

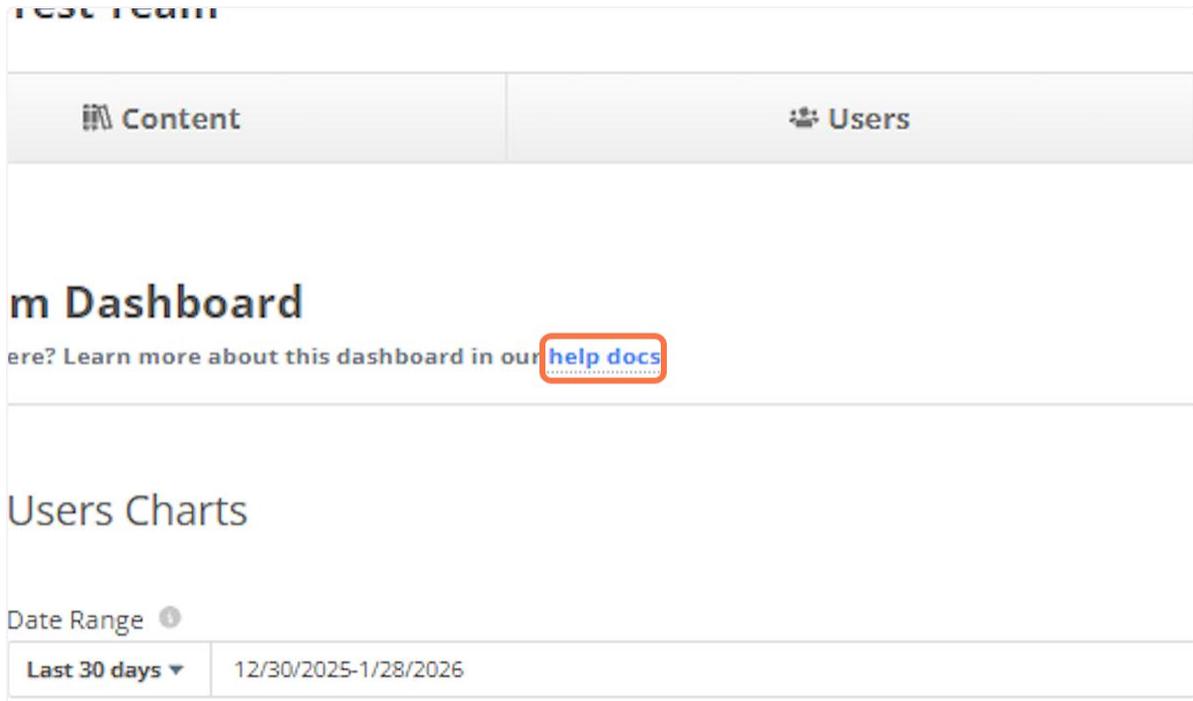


### 2. Click on Dashboard



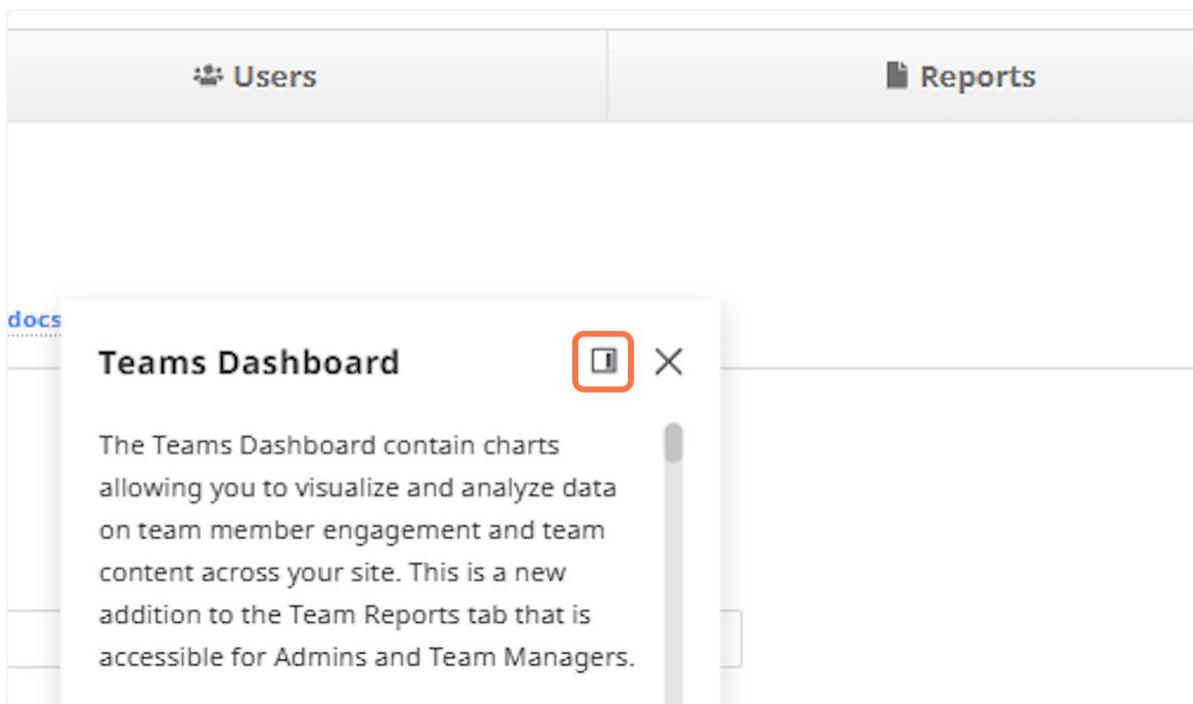
### 3. Click on help docs

Access the help docs for additional information on getting the most out of your teams dashboard.



The screenshot shows the top navigation bar with 'Content' and 'Users' tabs. Below the navigation bar, the main heading is 'Teams Dashboard'. A sub-heading reads 'Learn more about this dashboard in our [help docs](#)', where the 'help docs' link is highlighted with a red rectangular box. Below this, there is a section titled 'Users Charts' and a 'Date Range' selector set to 'Last 30 days' with a date range of '12/30/2025-1/28/2026'.

### 4. Click on Open in sidebar



The screenshot shows the top navigation bar with 'Users' and 'Reports' tabs. A modal window titled 'Teams Dashboard' is open, displaying a description of the dashboard. The 'Open in sidebar' button, represented by a square icon with a vertical bar, is highlighted with a red rectangular box. The text in the modal reads: 'The Teams Dashboard contain charts allowing you to visualize and analyze data on team member engagement and team content across your site. This is a new addition to the Team Reports tab that is accessible for Admins and Team Managers.'

## 5. Click on Example Video

- [Certificates & Credits Charts](#)
- [Content Charts](#)
- [Assessments & Surveys Charts](#)
- [Example Video](#)

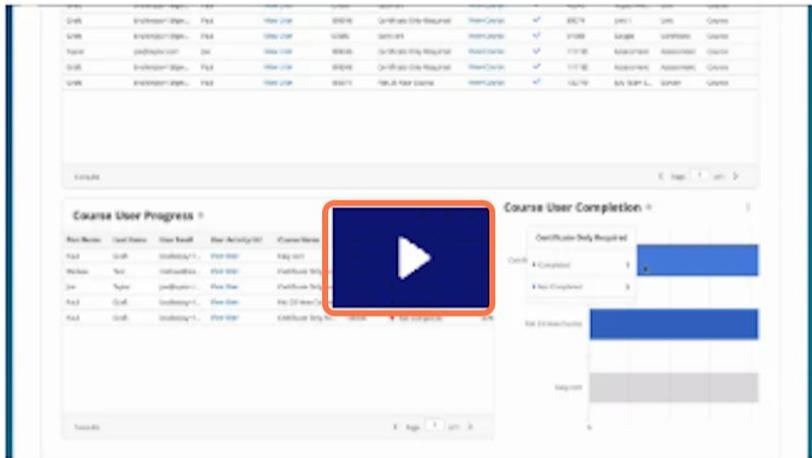
## Overview

Team Managers now have access to a dashboard for their individual team. This dashboard

## 6. Click on Play Video

The short video is a great introduction to all the charts on the dashboard and how to interact with them.

## Example video

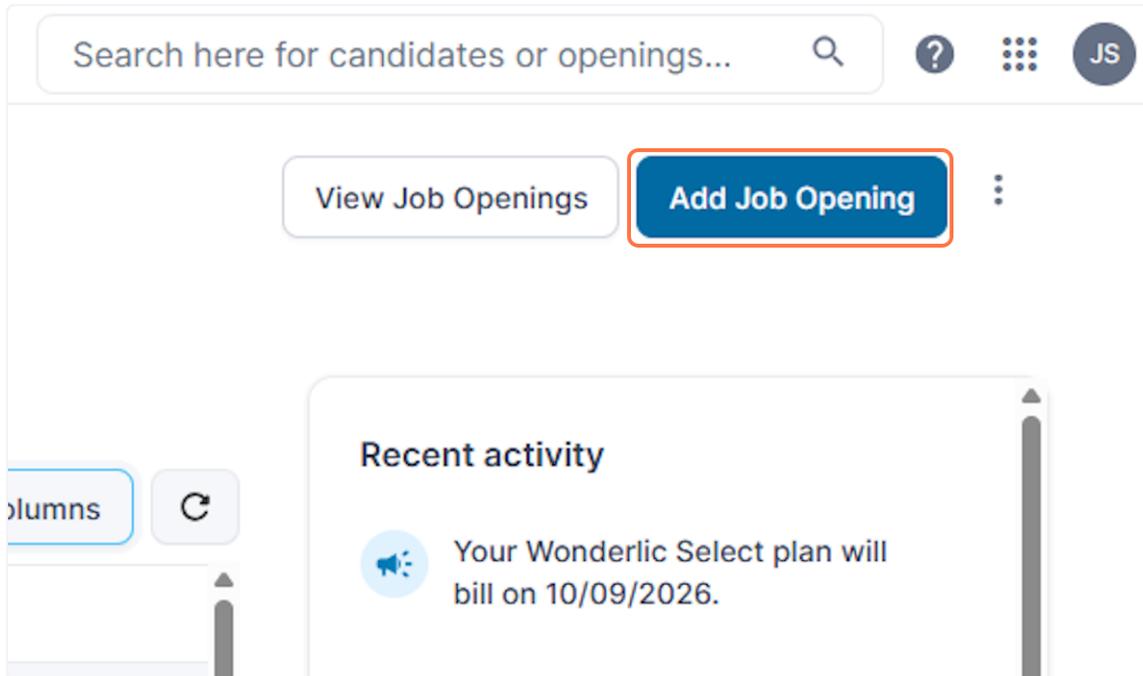


The screenshot shows a dashboard with two main sections: 'Course User Progress' and 'Course User Completion'. The 'Course User Progress' section contains a table with columns for Row Number, User Name, User Email, User Activity ID, and Completion. The 'Course User Completion' section contains a bar chart showing completion rates for 'Certificate Only Required' and 'No Certificate' categories. A play button icon is overlaid on the 'Course User Progress' table.

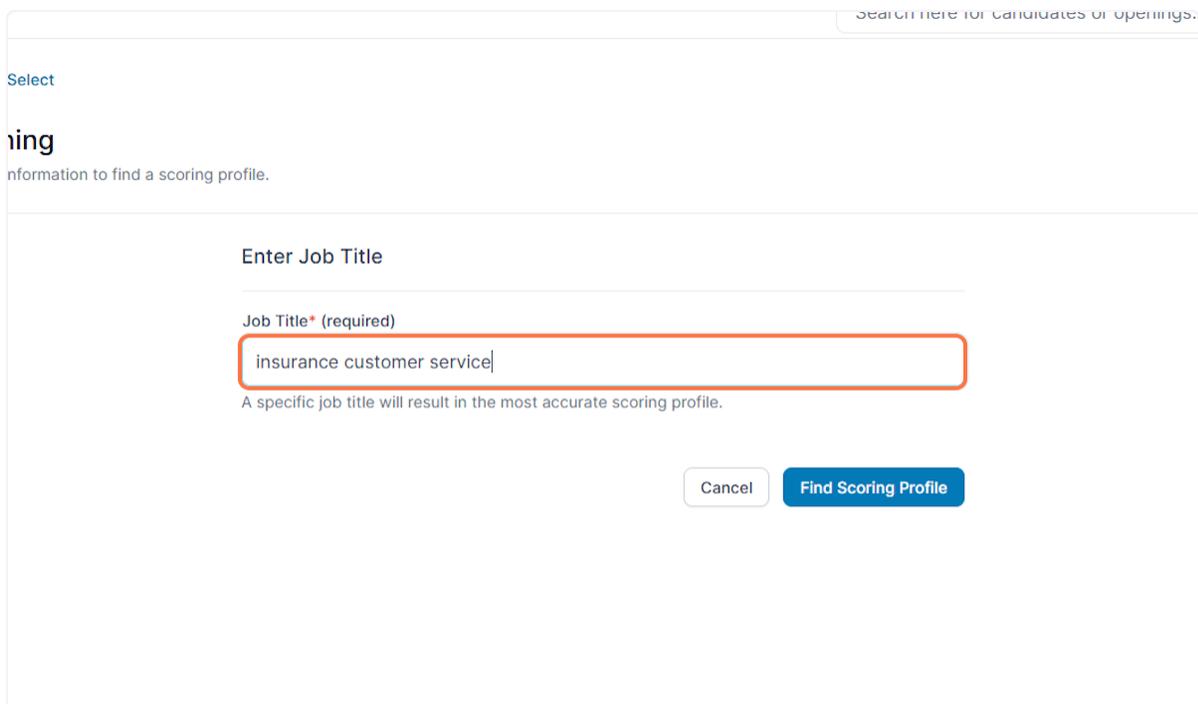
RELATED ARTICLES

## How to Add a Job Opening in Wonderlic

### 1. Click on Add Job Opening



### 2. Type "insurance customer service"



The screenshot shows the "Enter Job Title" form in the Wonderlic dashboard. At the top, there is a search bar with the placeholder text "Search here for candidates or openings...". Below the search bar, there is a "Select" dropdown menu. The "Job Title" field is required and contains the text "insurance customer service". Below the "Job Title" field, there is a note: "A specific job title will result in the most accurate scoring profile." At the bottom of the form, there are two buttons: "Cancel" and "Find Scoring Profile".

Select

Job Title

information to find a scoring profile.

Enter Job Title

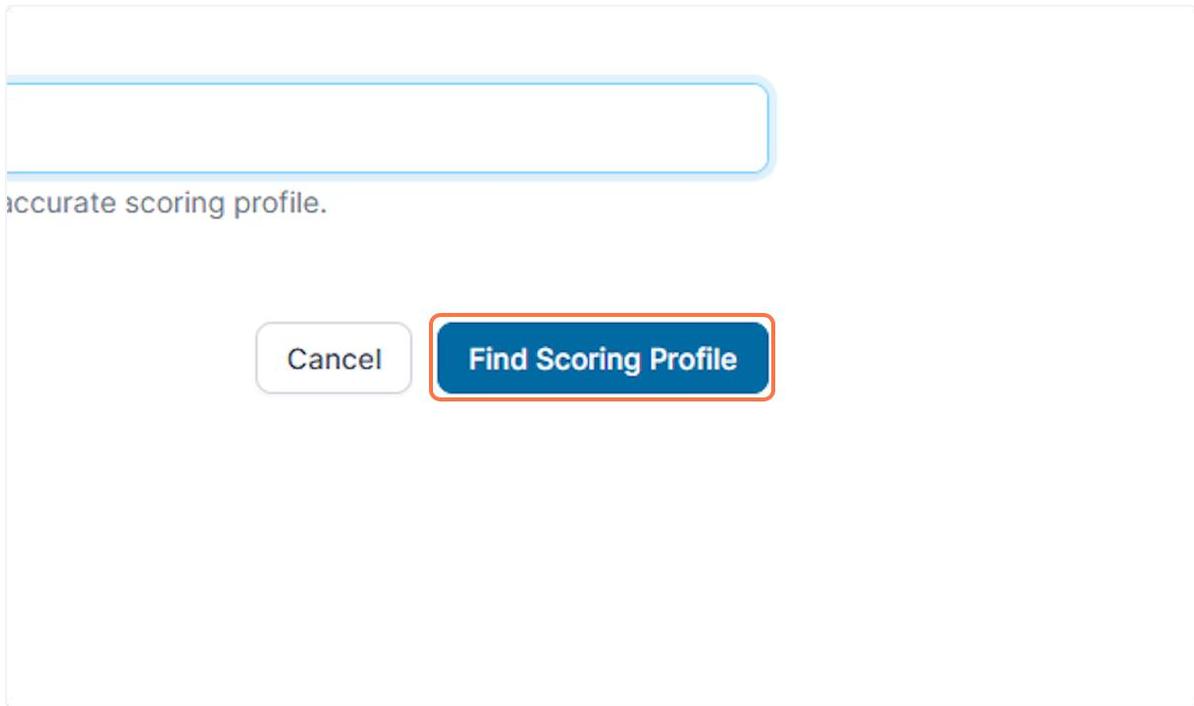
Job Title\* (required)

insurance customer service

A specific job title will result in the most accurate scoring profile.

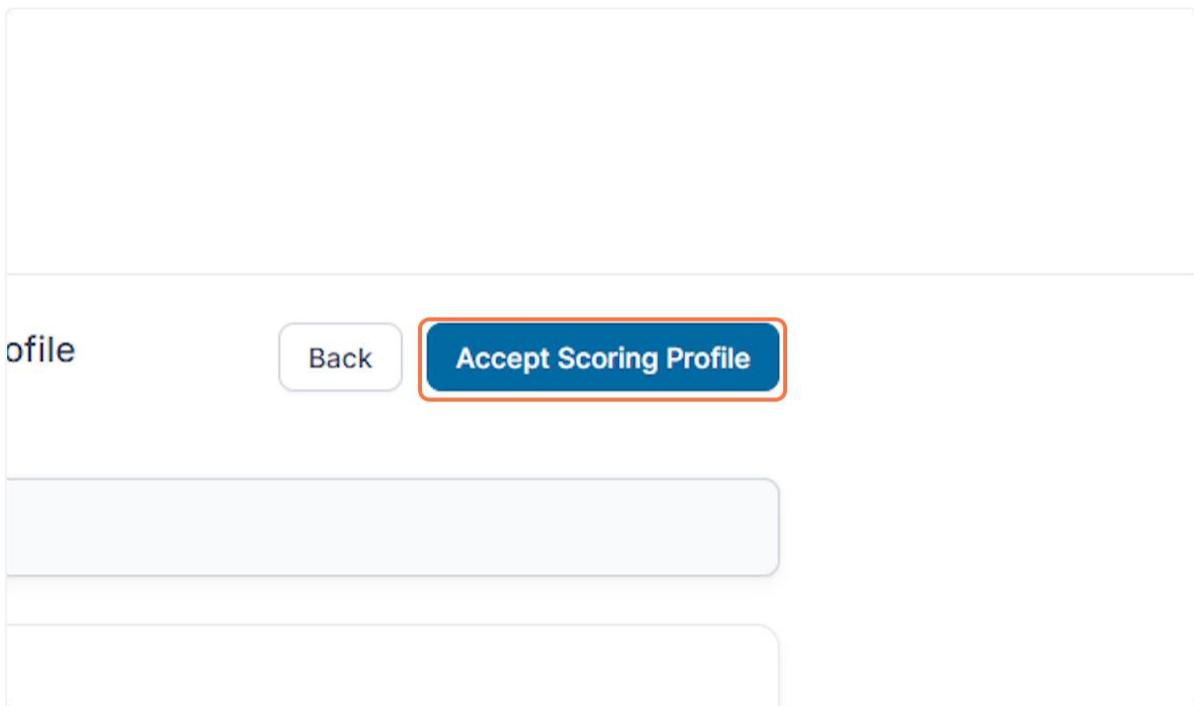
Cancel Find Scoring Profile

**3. Click on Find Scoring Profile**



This screenshot shows a form with a text input field at the top. Below the input field, the text "accurate scoring profile." is visible. At the bottom of the form, there are two buttons: a "Cancel" button and a "Find Scoring Profile" button. The "Find Scoring Profile" button is highlighted with a red border.

**4. Click on Accept Scoring Profile**



This screenshot shows a form with a "profile" label on the left. In the center, there are two buttons: a "Back" button and an "Accept Scoring Profile" button. The "Accept Scoring Profile" button is highlighted with a red border. Below the buttons, there are two horizontal bars, one light blue and one white.

### 5. Click on Add Job Opening

s to eligible candidates upon completion of their

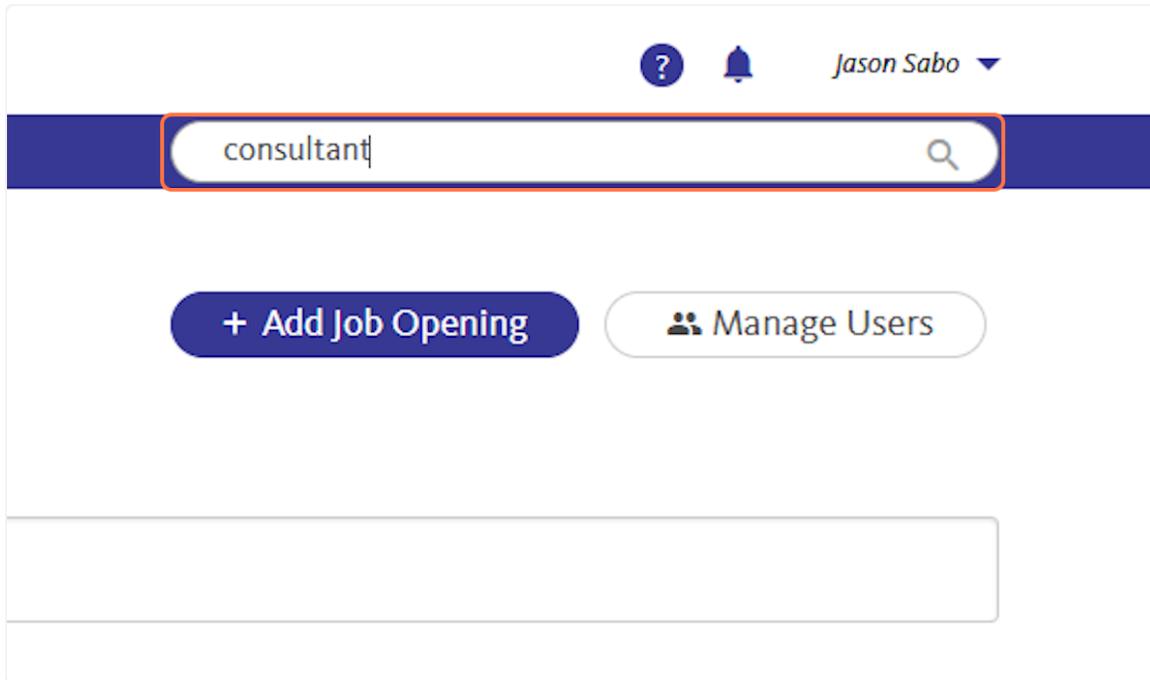
fied of candidate activity via email

[Back](#) [Add Job Opening](#)

[Privacy Policy](#) © 2026 Wonde

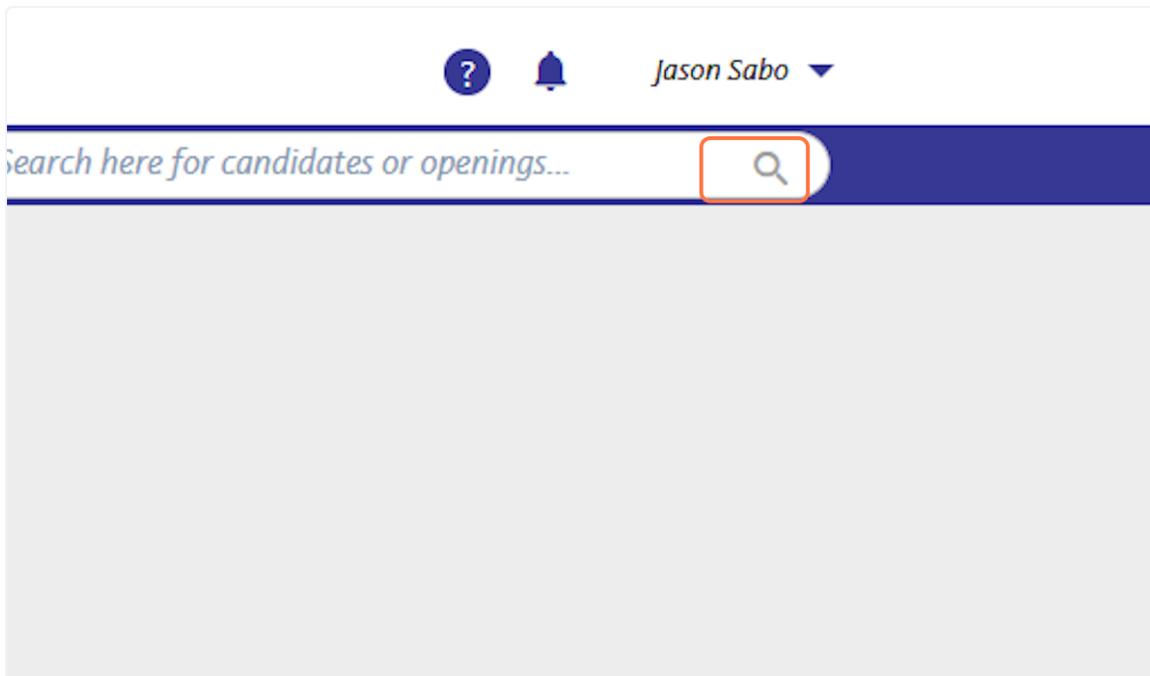
## How to Navigate Wonderlic Job Openings

### 1. Type "Job Title"



The screenshot shows the top navigation bar of the Wonderlic Job Openings interface. In the top right corner, there are icons for help (a question mark) and notifications (a bell), followed by the user name "Jason Sabo" and a dropdown arrow. Below the navigation bar is a dark blue header with a white search bar containing the text "consultant". A magnifying glass icon is on the right side of the search bar. Below the search bar are two buttons: a dark blue button with a white plus sign and the text "+ Add Job Opening", and a white button with a dark blue border and the text "Manage Users" next to a person icon. Below these buttons is a large, empty white rectangular box.

### 2. Click on search



The screenshot shows the top navigation bar of the Wonderlic Job Openings interface. In the top right corner, there are icons for help (a question mark) and notifications (a bell), followed by the user name "Jason Sabo" and a dropdown arrow. Below the navigation bar is a dark blue header with a white search bar containing the placeholder text "Search here for candidates or openings...". A magnifying glass icon is on the right side of the search bar, which is highlighted with a red box. Below the search bar is a large, empty light gray rectangular box.

### 3. Click on the job you want to review

The screenshot shows the 'wonderlic Select' dashboard. The breadcrumb trail is 'Dashboard > Search Results'. The page title is 'Search Results' with a sub-header 'Displaying 1 result for "consultant"'. A single job listing is shown for 'I|ANC Technology Consultant' in Cary, NC, which is highlighted with an orange box. The listing includes the text 'HIRING MANAGER Jason Sabo' and '1 year since last active'. Below the listing, it says 'Displaying 1 result for "consultant"'. A search bar is visible in the top right corner.

### 4. Click on candidate name

The screenshot shows the 'Candidate List' for the 'Technology Consultant' position. The breadcrumb trail is 'Openings > Candidate List'. The page title is 'Technology Consultant' with buttons for 'Test Candidate' and 'Quick Apply Link'. The status is 'All / Active / Archived / Hired' and it is sorted by 'Score / Activity'. Three candidates are listed:

| Candidate Name | Status | Applied    | Cognitive Ability | Motivation | Personality |
|----------------|--------|------------|-------------------|------------|-------------|
| John Petersen  | Active | 12/18/2024 | 48                | 35         | 70          |
| Rob Cook       | Active | 12/18/2024 | 24                | 65         | 9           |
| Jason Sabo     | Active | 5/8/2025   | -                 | -          | -           |

The name 'John Petersen' is highlighted with an orange box. The 'Active' status is shown in a dropdown menu for each candidate.

## 5. Click on Interview

Dashboard > Job Openings > IIANC Technology Consultar

# John Petersen

Active ▾ Assessment completed 12/18/2024

Results **Interview** New Hire Success Tips

Overall Fit

Cognitive Ability

John is a

The Overall measure of

## 6. Click on Interview

Active ▾ Assessment completed 12/18/2024

Results **Interview** New Hire Success Tips

Structured Interview Instructions

Print Interview Guide

Question 1

Question 2

Question 3

Question 4

Question 5

Question 6

Question 7

### Structured Interview Instructions

The job interview is one of the most common approaches organizations use to select candidates. However, it is also one of the most misused selection methods, with many companies employing unstructured interviews that are not focused on assessing job-related traits.

A structured interview can be substantially more effective than an unstructured interview in determining which candidate is a good fit for your company. By using the following Structured Interview Guide, you'll be asking questions that are based on job-related competencies, and you'll be posing the same questions to all candidates. This will help you avoid making misguided and sometimes biased decisions.

#### Agenda for Interview

##### 1. Set the context

Introduce the candidate to the interview process.

- Give a brief description of the role they are interviewing for.
- Explain that they will be asked several questions about their past job experience and instruct them to describe the situation they faced, what they did, and the result.
- Mention that you will be taking notes during the interview.

##### 2. Ask structured interview questions

Read the questions to the candidate as they are stated on the guide.

- Take specific notes on the situation they describe, their actions, rationale, and

## 7. Click on Question 1

Active ▾ Assessment completed 12/18/2024

Results **Interview** New Hire Success Tips

---

Structured Interview Instructions

**Question 1**

Question 2

Question 3

Question 4

Question 5

### Structured Interview Instructions

The job interview is one of the most common ways to select candidates. However, it is also one of the most challenging with many companies employing unstructured interviews for assessing job-related traits.

A structured interview can be substantially more effective in determining which candidate is best for the job. The following Structured Interview Guide provides information on job-related competencies, and you can use it to assess candidates. This will help you avoid making

## 8. Click on New Hire Success Tips

Dashboard > Job Openings > IIANC Technology Consultant > **Candidate**

## John Petersen

Active ▾ Assessment completed 12/18/2024

Results **Interview** **New Hire Success Tips**

---

Structured Interview Instructions

Question 1

Question 2

### Decision Making ⓘ

Question

Please describe a time when you had to make a decision and the actions when trying to solve a problem.

## 9. Click on New Hire Success Tips

Dashboard > Job Openings > IIANC Technology Consultant > Candidate

**John Petersen** Download Results Contact Info

Active Assessment completed 12/18/2024

Results Interview **New Hire Success Tips**

**New Hire Success Instructions** Print New Hire Success Tips

**Onboarding and Training**

*Note: New Hire Success Tips are not designed for making hiring decisions. These tips do not indicate job fit and are intended solely for onboarding after a candidate has been hired.*

New Hire Success Tips are personalized onboarding guides generated from each candidate's assessment results.

These individualized reports provide leaders with actionable insights into how each individual learns best, what motivates them, how they prefer to receive feedback, and how they work most effectively with others on teams.

Once you've marked a candidate as hired in Wonderlic Select, share their New Hire Success Tips with their direct supervisor or manager to help create a more personalized and effective onboarding experience.

Next →  
Onboarding and Training

## 10. Click on Onboarding and Training

**JOHN PETERSEN**

Active Assessment completed 12/18/2024

Results Interview **New Hire Success Tips**

**New Hire Success Instructions**

**Onboarding and Training**

Management and Coaching

Teams and Relationships

**New Hire Success Tips Instru**

*Note: New Hire Success Tips are not c  
tips do not indicate job fit and are inte  
has been hired.*

New Hire Success Tips are personaliz  
candidate's assessment results.

These individualized reports provide le  
individual learns best, what motivates  
and how they work most effectively w

## 11. Click on New Hire Success Tips

Active Assessment Completed 12/10/2024

Results Interview **New Hire Success Tips**

New Hire Success Instructions

**Onboarding and Training**

Management and Coaching

Teams and Relationships

Successful training is designed to ensure the greatest comprehension and engagement with minimal effort and time. This section uses what we know about this individual to provide suggestions for delivering training at the right level and complexity, tied to their interests, in a way that resonates with how they learn.

What you need to know about John

- John will likely learn tasks fairly quickly and may grasp moderately complex material without needing instruction.
- This individual is likely to be curious and eager to learn but may not focus on small details.
- John is likely to remain collected when learning difficult material and may be more accepting of constructive feedback on progress.
- John is likely to be more comfortable with one-on-one training and feedback.

You may increase training engagement by considering this individual's interests throughout the learning process.

- John has a strong interest in learning why things work and investigating them.
- During training, consider providing them with enough time and resources to completely understand their job and how it fits in with the rest of the organization.

← Previous  
New Hire Success Instructions

Next  
Management and Coaching →

Feedback

## 12. Click on Management and Coaching

Results Interview **New Hire Success Tips**

New Hire Success Instructions

Onboarding and Training

**Management and Coaching**

Teams and Relationships

**Onboarding and Training**

Successful training is designed to ensure engagement with minimal effort and time. This section uses what we know about this individual to provide suggestions for delivering training at the right level and complexity, tied to their interests, in a way that resonates with how they learn.

What you need to know about John

- John will likely learn tasks fairly quickly and may grasp moderately complex material without needing instruction.
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- John is likely to remain collected when learning difficult material and may be more accepting of constructive feedback on progress.
- John is likely to be more comfortable with one-on-one training and feedback.

### 13. Click on New Hire Success Tips

Active Assessment Completed 12/10/2024

Results Interview **New Hire Success Tips**

New Hire Success Instructions

Onboarding and Training

**Management and Coaching**

Teams and Relationships

#### Management and Coaching

Successful management and coaching tailors rewards and recognition to an employee's interests and personality. This section uses what we know about this individual to provide suggestions for motivating them to reach their greatest productivity and job satisfaction.

How to provide this individual feedback

- This individual may prefer receiving recognition for their performance in private.
- Consider discussing their accomplishments one-on-one rather than in front of others.

Try incorporating the following insights about this individual into how you manage them

- John will be driven by the opportunity to methodically gather information and solve complex or scientific problems.
- When managing or coaching John, provide the opportunity to continually learn new information and refine analytical skills by assigning challenging problems.
- John will likely feel a sense of fulfillment when provided the opportunity to troubleshoot issues, analyze data, and evaluate potential solutions in a rigorous manner.

You may need to provide extra support or guidance regarding the following

- Focus on the importance of cooperating with others on the job and delivering feedback in a positive and respectful manner.
- This individual will likely be able to handle challenging and complex tasks.
- Additional tasks or responsibilities may assist in keeping this individual engaged while on the job.
- Work with John to ensure that these extra activities are aligned with their

Feedback

## How to Review Candidate Scoring Profile

### 1. Click on IIANC Technology Consultant

Job Openings

Active X

| OPENINGS                                  | TOTAL | ACTIVE CANDIDATE |   |
|---|-------|------------------|---|
| IIANC Technology Consultant               | 4     | 1                | 1 |
| Customer Service Representative           | 10    | 4                | 1 |
| Account Manager                           | 5     | 1                | 1 |
| Director Of Property Risk                 | 2     | 0                | 0 |
| Insurance Customer Service Representative | 0     | 0                | 0 |

### 2. Click on John Petersen

ect

Openings > Candidate List

Search here for candidates or openings...

Technology Consultant

Test Candidate Quick Apply Link

All / Active / Archived / Hired SORT BY Score / Activity

1 year since last active Applied 12/18/2024 Active

John Petersen

Cognitive Ability 48 Motivation 35 Personality 70

1 year since last active Applied 12/18/2024 Active

Rob Cook

Cognitive Ability 24 Motivation 65 Personality 9

Not started Applied 5/8/2025 Active

Jason Sabo

### 3. Click on Results

Results Interview New Hire Success Tips

Assessment Completed 12/10/2024

Overall Fit

Cognitive Ability

Personality

Motivation

All Fit Scores

#### John is a **Cautionary** Fit for: IIANC Technology Consultant

The Overall Fit score combines this candidate's assessment results into one overall measure of how well suited they are for the IIANC Technology Consultant role.

John's overall fit score of 45 is better than 44% of the expected IIANC Technology Consultant candidates.

A score in this range is below average suggesting they have some weaknesses that make them less likely to be successful in this role.

**KEY INDICATORS OF JOB PERFORMANCE**

|                       |         |    |
|-----------------------|---------|----|
| Cognitive Ability     | Caution | 45 |
| Dependability         | Strong  | 77 |
| Traditional Interests | Caution | 31 |
| Sociability           | Caution | 37 |
| Stress Tolerance      | Strong  | 79 |

**Overall Fit - Key Indicators**

Key Indicators are job-specific and show the most important attributes for this role, ranked by their impact on the candidate's overall fit score.

Feedback

### 4. Click on Results

Key indicators are job-specific and show the most important attributes for this role, ranked by their impact on the candidate's overall fit score.

**48** Cognitive Ability

Caution

Better Fit

A candidate scoring in the cautionary range mostly does not meet the cognitive ability requirements for this position, meaning the individual may:

- Need additional training and supervision to learn necessary job skills
- Take longer than others to perform tasks necessary for this job
- Struggle to handle many of the problem solving needs of this job

**77** Dependability

Strong

Better Fit

Unreliable Thorough

Individuals scoring in the Thorough range tend to be organized, hardworking, and reliable.

## 5. Click on Results

The screenshot displays the Wonderlic Select results page. At the top, there is a search bar and navigation tabs for Results, Interview, and New Hire Success Tips. A bullet point indicates a struggle to handle many of the problem-solving needs of the job. Two personality traits are highlighted: Dependability (score 77, Strong) and Traditional Interests (score 31, Caution). Each trait includes a horizontal scale from Unreliable to Thorough or Uninterested to Interested, with a 'Better Fit' marker. Below each trait, there are general descriptions and specific behavioral tendencies.

Wonderlic Select Search here for candidates or openings... 45

Results Interview New Hire Success Tips

- Struggle to handle many of the problem solving needs of this job

**77** Dependability Strong

Unreliable |----- Better Fit -----| Thorough

Individuals scoring in the Thorough range tend to be organized, hardworking, and reliable.

These individuals generally:

- Tend to plan, organize, and methodically approach tasks
- Persist on tasks despite distractions or obstacles
- Hold themselves accountable for work outcomes and deadlines

These individuals might:

- Be perceived as inflexible at times
- Set higher personal goals than they can meet

**31** Traditional Interests Caution

Uninterested |----- Better Fit -----| Interested

Individuals with a low level of Traditional Interests are generally not motivated by jobs that require routine and structured tasks and activities. They may dislike roles

Feedback