

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](https://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 Education@TheInsurAcademy.com for a customized plan.

LEARNING PLANS

1

INTRODUCTION TO THE INSURANCE INDUSTRY LEARNING PLAN CE CREDIT

This learning plan provides new insurance professionals with a solid foundation in essential industry concepts. Courses cover risk management, types of insurance, Property and Casualty basics, distribution channels, policy design, and Errors & Omissions insurance. Each course is multi-modal, with interactive elements and assessments to ensure comprehensive understanding.

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 CE CREDIT

This learning plan equips insurance professionals with the skills to effectively manage relationships within the industry. Courses cover communication styles, client interactions, role relationships, trust building, conflict management, and mastering multigenerational dynamics. Interactive elements and assessments ensure comprehensive understanding and practical application.

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 provides a comprehensive understanding of personal lines insurance. It covers key aspects of homeowners insurance, including liability, property, and dwelling coverage, as well as personal auto insurance, liability umbrella policies, and watercraft insurance. The courses also address recent updates to ISO forms and renters' coverage. Interactive elements and assessments ensure thorough knowledge and practical application.

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 learning plan equips insurance professionals with essential knowledge of commercial lines coverage. Topics include property principles, business income, CGL coverages and exclusions, workers compensation, business auto coverages, and umbrella liability. The courses also cover certificates of insurance, surety bonds, and additional insureds. Interactive elements and assessments ensure comprehensive understanding and practical application.

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**

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**NC SPECIFIC
PERSONAL LINES –
INSURANCE
FORMS AND
RATINGS
LEARNING PLAN**
CE CREDIT

This learning plan provides a comprehensive understanding of personal lines insurance forms and ratings specific to North Carolina. It covers NC-specific forms such as FS-1 and DL-123, as well as foundational knowledge of the North Carolina Rate Bureau for personal lines. Interactive elements and assessments ensure a thorough grasp of the material.

1. **Personal Lines Forms** – NC Specific Forms (FS-1, DL-123)
2. **Foundations of the NC Rate Bureau** – Personal Lines

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**NC SPECIFIC
COMMERCIAL
LINES –
INSURANCE
FORMS AND
RATINGS
LEARNING PLAN**
CE CREDIT

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

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**BEST PRACTICES
CSR
COMMUNICATION
LEARNING PLAN**
CE CREDIT

This learning plan equips insurance professionals with the skills to effectively manage relationships within the industry. Courses cover communication styles, client interactions, role relationships, trust building, conflict management, and mastering multigenerational dynamics. Interactive elements and assessments ensure comprehensive understanding and practical 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**
CE CREDIT

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 CE CREDIT

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**

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EMPLOYEE BENEFITS COURSES (AVAILABLE INDIVIDUALLY)

Expand your knowledge of healthcare, group plans, tax-advantaged accounts, and key ancillary benefits like vision, dental, life, and disability insurance. These courses are designed to help you better serve clients and strengthen your expertise in employee benefits.

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

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!

Contact Us:



Education@TheInsurAcademy.com



919-377-1649