

AGENT DEVELOPMENT PROGRAM

PROVIDING TURNKEY AGENT TRAINING SOLUTIONS

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 activities, and a Mentor Program with one-on-one support and group sessions on relevant topics.



Program Highlights Include:



CUSTOMIZED LEARNING EXPERIENCE AND BRANDING

A tailored LMS platform featuring personalized learning paths, custom dashboards, and agency-branded tools to support professional growth.



REPORTING AND TRACKING

Access detailed reports to track learning progress, assessments, and achievements, with certificates awarded upon course completion.



LIVE MONTHLY WEBINARS

Engage in expert-led webinars on technical insurance topics, workflow mastery, professional development skills, and more!



AGENCY MANAGER TOOLS & PROFESSIONAL SUPPORT

Agency Manager LMS Permissions include tools to monitor course progress, manage user access, and customize training programs through a dedicated dashboard.



MENTOR PROGRAM

One-on-one sessions and quarterly group meetings provide personalized guidance for new account managers to build knowledge and excel in their careers.



UNLIMITED ASSESSMENTS & LEARNING TOOLS

Gain valuable insights through cognitive, personality, and motivation assessments, and access an extensive library of courses for every career stage.

Ready to enroll your agents?

Email us at Education@TheInsurAcademy.com for more info, or scan the QR code to learn more and complete the Agent Development Program interest form, and our InsurAcademy team will connect with you!



Education@TheInsurAcademy.com



919-377-1649



Program Overview

Individualized on-demand learning and live webinars

Learning Plans and Courses

1 Introduction to Insurance

- 5 Courses
- Basics of insurance, P&C, risk transfer, and E&O.

2 Insurance Relationship Management

- 4 Courses
- Building trust, managing relationships, and team dynamics.

3 Coverage Training: Personal Lines

- 17 Courses
- Auto, umbrella, homeowners, personal watercraft, and more.

4 Coverage Training: Commercial Lines

- 23 Courses
- COPE, business income, workers' comp, surety bonds, and more.

5 Personal Lines: Forms and Ratings

- 2 Courses
- NC Specific Forms (FS-1, DL 123) and more.

6 Commercial Lines: Forms and Ratings

- 2 Courses
- ACORD forms, endorsements, bind forms, COIs, and more.

7 CSR Communication Best Practices

- 4 Courses
- Customer management, time management, and sales basics.

8 Technology Tips & Tricks

- 2 Courses
- Tech mastery and Google/Microsoft tools.

9 Professional Excellence Essentials

- 3 Courses
- Emotional intelligence, professional presence, workflows

10 Employee Benefits Courses

- 23 Courses
- Healthcare, group plans, and ancillary benefits.

11 Team Leader's and New Manager Series

- 12 Courses
- Leadership, hiring, retention, and team management.

Knowledge Assessments

Help identify an agent's current knowledge, uncover strengths and skill gaps, and generate personalized course recommendations to guide development. Supervisors also receive a summary of results to support coaching and performance conversations.

Role-Based Learning Paths

Accelerate onboarding and professional growth with structured learning paths designed for: **Personal Lines CSR, Commercial Lines CSR, Multi-Line CSR, Employee Benefits, Interns & Unlicensed Staff, and New Managers & Team Leads.**

Each learning path includes curated courses, recommended pacing, and a clear roadmap that helps learners build confidence and progress toward role-specific goals.

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:



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