

Business Skills for Account Managers

- # **VERBAL COMMUNICATION SKILLS – EFFECTIVE COMMUNICATION:** The Verbal Communication Skills: Effective Communication learning module helps the learner to discover how to communicate eloquently in person and on the phone using examples and sample calls. The user will understand proper greeting, hold and transfer and closing protocol, as well as how to create impactful first impressions by using tone, body language and word choice to their advantage. The learner will also receive helpful tips about effective listening.
- # **VERBAL COMMUNICATION SKILLS – BUILDING RAPPORT:** The Verbal Communication Skills: Building Rapport learning module helps the learner to uncover the definition of rapport while infusing the importance of making a good first impression. The user will acquire a step-by-step process of rapport building and view samples of good rapport building techniques
- # **BUSINESS WRITING 101:** The Business Writing 101 learning module creates an overview of core business writing principles. The module reviews sentence structure, punctuation and grammar tips. Examples of correspondence often used within insurance agencies are included. The power and impact of word choice on the reader’s perception is covered within this module.
- # **BUSINESS WRITING 201:** The Business Writing 201 learning module leads the learner through a grammar review. The concept and examples of powerful opening and closing lines within correspondence is introduced. Included in this module are business writing essentials to create more powerful communication such as: concrete nouns, avoiding clichés, active voice, etc.
- # **INTRODUCTION TO ERRORS & OMISSIONS:** The Introduction to Errors & Omissions learning module teaches the user about important information, insurance regulations, licensing and authority. The user will also explore the fiduciary duties of an insurance agency.
- # **ERRORS & OMISSIONS – WHAT CAN YOU DO?** The Errors & Omissions: What Can You Do? learning module reviews the definitions of errors and omissions, along with important information about who is liable and the possible consequences. A top ten list of the errors and omissions agencies experience is explained in detail. The user will explore and retain best practices in avoiding E&O exposure.
- # **CUSTOMER MANAGEMENT – ANTICIPATING NEEDS:** The Customer Management: Anticipating Needs learning module explores the roles within the insurance agency and helps the learner to understand the new business workflow, renewal workflow and certificates of insurance process. The user will also learn how to build credibility and loyalty with co-workers and clients, how to develop a strong client retention strategy and understand how anticipating needs will aid in customer management.
- # **CUSTOMER MANAGEMENT – BALANCING PRIORITIES:** The Customer Management: Balancing Priorities learning module explores different time management strategies for balancing client’s requests and agency demands. The learner will also develop techniques to prioritize agency duties, avoid procrastination, manage a workload and manage a workspace.
- # **INTRODUCTION TO RELATIONSHIP MANAGEMENT:** The Introduction to Relationship Management learning module introduces the learner to the four communication styles. The learner will identify their own communication style and learn techniques for communicating with others such as clients, team members, managers and carrier underwriters.
- # **BUILDING TRUST AND MANAGING CONFLICT:** The Building Trust and Managing Conflict learning module helps the learner review the four communication styles often used and discussed in relationship management. The module also demonstrates for the user how to build trust with clients. A section on managing conflict provides ready to use tips.

- ✦ **INTRODUCTION TO NEGOTIATION SKILLS:** The Introduction to Negotiation Skills learning module introduces the learner to an overview of negotiation techniques and the seven steps to agreement. Utilizing great information as described by Harry Mills in his book, *The Street Smart Negotiator*, the user will, after this learning module, be able to apply the tips to successfully negotiate within the insurance industry.
- ✦ **NEGOTIATION STEPS AND BUILDING CREDIBILITY:** The Negotiation Steps and Building Credibility learning module expands on the techniques from the Introduction to Negotiation Skills module. This module targets an approach to build credibility with the other party in a negotiation.
- ✦ **POWERFUL & PERSUASIVE COMMUNICATION SKILLS:** This course introduces the user to the impact of effective messaging on professional relationships, stressing powerful and persuasive messaging. Powerful and persuasive messaging includes the impact of perceptions and impressions. The user will also develop planning techniques for communication and negotiating.
- ✦ **FINE TUNE YOUR ELEVATOR PITCH:** This course outlines 'how' to create an Elevator Pitch for your company, yourself and tailored to a specific individual. Upon completing this training, you will have the essential elements of an Elevator Pitch prepared and ready.
- ✦ **PERSONAL TIME MANAGEMENT:** In the Personal Time Management module, you will identify time wasters and tips for setting priorities, understand what items rob you of your time each day and how to solve these issues, deploy techniques to avoid interruptions, understand how to say no positively and how to balance your client demands and deadlines, and finally, you will create a personal action plan for improving your time management skills.