



# THE ULTIMATE ACCOUNT MANAGER™



Move from Reactive to **Proactive** Customer Service and True Account Management

Estimates are that over 400,000 new people will enter the insurance industry in the next three years, yet...

*we still haven't figured out how to train those we already have!* Join us for a LIVE, interactive program unlike any other!

***That ends NOW!***

- Experienced Account Managers will enhance their skills, productivity and effectiveness
- Newcomers will acquire powerful methods that represent world-class customer service
- Everyone learns to reduce errors and omissions exposures and develops true career satisfaction
- Learn the things you wish you'd known your first day, week or month on the job – it's never too late

*"I just wanted to reach out to you and say how much I enjoyed the UAMS program! It really is life-changing for me in so many ways. I think if I had taken this class four years ago when I became a commercial account manager, it would have made the process so much better for me. I may not have had to leave that agency due to being overwhelmed and stressed out to the point where it was affecting my health."*

*Jennifer, Michigan*

► This is not your typical CE class – this class offers REAL WORLD solutions to the problems faced by Account Managers – too much work, too little time, and too high demands – all with too little enjoyment, career growth or confidence that you are really making a difference for your clients and your agency. Whether you are in Commercial, Personal or Employee Benefits, this program is for YOU!

► Walk away with practical solutions to your most challenging issues, a rejuvenated sense of purpose and a renewed commitment to being an extraordinary Account Manager in a great industry!



Agency Management Resource Group  
PO Box 1330  
Lincoln, CA 95648  
[www.agencymanagement.com](http://www.agencymanagement.com)



For more information, contact us:  
Cheryl Koch 916.956.1760  
[cheryl@agencymanagement.com](mailto:cheryl@agencymanagement.com)

Sharon Koches 908.510.2652  
[sakoches@ManagingPerformance.onmicrosoft.com](mailto:sakoches@ManagingPerformance.onmicrosoft.com)



**MAXIMIZE YOUR EFFICIENCY AND EFFECTIVENESS THROUGH ACTION!  
BE PREPARED TO LEARN AND IMMEDIATELY APPLY PROVEN PRACTICES ON THE JOB.**

## MODULE 1

January 17, 2023  
1:00 to 3:00pm (Eastern)

### The Ultimate Account Manager

- ❖ Personality and learning styles
- ❖ Critical skills of the Ultimate Account Manager
- ❖ Essential accountabilities of an Account Manager
- ❖ Develop a career development plan

## MODULE 4

January 26, 2023  
1:00 to 3:00pm (Eastern)

### Errors and Omissions Loss Control

- ❖ History and evolution of agency E&O claims
- ❖ Underlying causes of E&O losses and their cost
- ❖ The STOP IT list
- ❖ Effective agency procedures
- ❖ File documentation for E&O reduction and database integrity

## MODULE 2

January 19, 2023  
1:00 to 3:00pm (Eastern)

### Client Value and Desk Management

- ❖ Elicit a WOW from your agency's customers
- ❖ Successful desk management and extraordinary customer service
- ❖ Chronic backlog and how to eliminate it
- ❖ Reduce E&O exposures, improve customer service and provide greater job satisfaction and accomplishment

## MODULE 5

January 31, 2023  
1:00 to 3:00pm (Eastern)

### Effective Communication

- ❖ Diversity and inclusion in the insurance industry
- ❖ Active listening and its role in customer service
- ❖ Client objections and skills to work through them
- ❖ Fierce conversations
- ❖ Negotiate for win-win-win results

## MODULE 3

January 24, 2023  
1:00 to 3:00pm (Eastern)

### Risk Management and Contract Analysis

- ❖ Fundamentals and application of the risk management process
- ❖ Contract law and its relationship to insurance policies
- ❖ Insurance policy analysis
- ❖ Contractual risk transfer

## MODULE 6

February 2, 2023  
1:00 to 3:00pm (Eastern)

### What Will Be

- ❖ Generations in the workplace – their challenges and contributions
- ❖ The positive impact of having a more diverse agency
- ❖ Current state of the insurance marketplace
- ❖ Current and emerging trends and their impact on the independent agency

**ADDRESSING THE NEEDS OF ACCOUNT MANAGERS, THE AGENCIES THEY REPRESENT AND THE CLIENTS THEY SERVE**

Program Fee - \$749 per person for all six modules

Includes textbook and exclusive access to additional online resources

Please register using the following link. <https://attendee.gotowebinar.com/register/4654058323864498704>

After registering, you will receive a confirmation email containing information about joining the webinar.



## CE Information



Approved for 7 Hours of CE Credits in Maine. \*CE credits vary by state.

*Requires full attendance at all sessions to qualify.*



**AGENCY MANAGEMENT**  
RESOURCE GROUP