



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!



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

MODULE 1

July 27, 2022
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

October 12, 2022
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

August 31, 2022
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

November 2, 2022
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

September 14, 2022
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

November 30, 2022
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/6540425547347944206>

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



CE Information



Up to 12 Hours of CE Credit*

*Varies by state. Currently approved in AL, AZ, CA, CO, CT, DC, DE, FL, GA, HI, IA, IL, IN, KY, MA, MD, MI, MN, MO, NC, NE, NH, NJ, NM, NY, OH, OR, PA, RI, SC, TN, UT, VA, VT, WI. Pending in other states. Requires full attendance at all sessions to qualify.



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