

Client Management Essentials

- ✦ **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.