

# AGENT DEVELOPMENT PROGRAM

*Providing turnkey agent training solutions*



**ALREADY IN THE PROGRAM? ENROLL YOURSELF OR YOUR AGENTS IN ANY OF THESE LEARNING PLANS. LOG IN TO [MY.IIANC.COM](https://my.iianc.com), AND CLICK ON "ADP PROGRAM" TO ACCESS THE COURSES**

**Interested in joining the program? Visit our [ADP Program page](#)**

Contact Learning Experience Manager, Christine Jones at [cjones@iianc.com](mailto:cjones@iianc.com) for a customized plan

## LEARNING PLANS

1

### INTRODUCTION TO THE INSURANCE INDUSTRY LEARNING PLAN 3 CE CREDITS

This learning plan provides new insurance professionals with a solid foundation in essential industry concepts. Courses cover risk management, types of insurance, Property and Casualty basics, distribution channels, policy design, and Errors & Omissions insurance. Each course is multi-modal, with interactive elements and assessments to ensure comprehensive understanding.

1. **Introduction to Insurance**
2. **Introduction to P & C Insurance**
3. **Introduction to Insurance Distribution Channels**
4. **Introduction to Risk Transfer & Policy Design**
5. **Introduction to Errors & Omissions**

2

### INSURANCE RELATIONSHIP MANAGEMENT LEARNING PLAN 3 CE CREDITS

This learning plan equips insurance professionals with the skills to effectively manage relationships within the industry. Courses cover communication styles, client interactions, role relationships, trust building, conflict management, and mastering multigenerational dynamics. Interactive elements and assessments ensure comprehensive understanding and practical application.

1. **Introduction to Relationship Management**
2. **Understanding the Relationship of Various Roles in Insurance.**
3. **Building Trust and Managing Conflict** (Dealing with Difficult Customers)
4. **Diversity to Unity:** Mastering Multigenerational Dynamics, Personalities, and Effective Team Traits.

# 3

## **PERSONAL LINES LEARNING PLAN** 8 CE CREDITS

This learning plan provides a comprehensive understanding of personal lines insurance. It covers key aspects of homeowners insurance, including liability, property, and dwelling coverage, as well as personal auto insurance, liability umbrella policies, and watercraft insurance. The courses also address recent updates to ISO forms and renters' coverage. Interactive elements and assessments ensure thorough knowledge and practical application.

1. **Homeowners Insurance Liability Core Principles**
2. **Homeowners Insurance Property Core Principles**
3. **Dwelling Coverage**
4. **HO-3 2011**
5. **HO-4 2011**
6. **HO-6 2011**
7. **HO-3 ISO 2022**
8. **Renter's Coverage: HO-4 and HO-14 ISO 2022**
9. **HO-6 ISO 2022**
10. **Homeowners Coverage Changes 2022**
11. **2000 ISO Homeowners Policy Form**
12. **Personal Auto Insurance**
13. **Intro to Personal Liability Umbrella**
14. **Intro to Personal Articles Floater - Inland Marine Policy**
15. **Intro to Personal Watercraft**
16. **Insurance to Value**
17. **Homeowners Personal Lines Reinforcement Game**
18. **Personal Lines Coverage Challenge Exam**

# 4

## **COMMERCIAL LINES LEARNING PLAN** 12 CE CREDITS

This learning plan equips insurance professionals with essential knowledge of commercial lines coverage. Topics include property principles, business income, CGL coverages and exclusions, workers compensation, business auto coverages, and umbrella liability. The courses also cover certificates of insurance, surety bonds, and additional insureds. Interactive elements and assessments ensure comprehensive understanding and practical application.

1. **Property Core Principles**
2. **Introduction to COPE**
3. **Property Coverage**
4. **Property Policy Limits**
5. **Introduction to Business Income**
6. **Introduction to Property Rating**
7. **CGL Core Principles**
8. **CGL Coverages**
9. **CGL Products-Completed Operations**
10. **CGL Exclusions**
11. **Workers Comp Core Principles**
12. **Workers Comp Coverages**
13. **Workers Comp Classifications**
14. **Business Auto Coverages**
15. **Business Auto Declarations, Classifications and Rating**
16. **Overview of Certificates of Insurance**
17. **Introduction to Surety Bonds**
18. **OCP Liability**
19. **Garage Coverages**
20. **Introduction to Umbrella**
21. **Umbrella Liability - Maintenance of Underlying Insurance**
22. **Introduction to BOP Property Coverages**
23. **Introduction to BOP Liability Coverages**
24. **Introduction to Additional Insured**
25. **Commercial Lines Exam**

5

*NC SPECIFIC*  
**PERSONAL LINES –  
INSURANCE  
FORMS AND  
RATINGS  
LEARNING PLAN**  
1 CE CREDIT

This learning plan provides a comprehensive understanding of personal lines insurance forms and ratings specific to North Carolina. It covers NC-specific forms such as FS-1 and DL-123, as well as foundational knowledge of the North Carolina Rate Bureau for personal lines. Interactive elements and assessments ensure a thorough grasp of the material.

1. **Personal Lines Forms** – NC Specific Forms (FS-1, DL-123)
2. **Foundations of the NC Rate Bureau** – Personal Lines

6

*NC SPECIFIC*  
**COMMERCIAL  
LINES –  
INSURANCE  
FORMS AND  
RATINGS  
LEARNING PLAN**  
2 CE CREDITS

This learning plan provides a thorough understanding of commercial lines insurance forms and ratings. It covers ACORD forms, endorsements, bond forms, certificates of insurance (COIs), and the foundational principles of the North Carolina Rate Bureau for commercial lines. Interactive elements and assessments ensure comprehensive knowledge and practical application.

1. **Commercial Lines Forms** – ACORD forms, Endorsements, Bond Forms, COIs
2. **Foundations of the NC Rate Bureau** – Commercial Lines

7

**BEST PRACTICES  
CSR  
COMMUNICATION  
LEARNING PLAN**  
3 CE CREDITS

This learning plan equips insurance professionals with the skills to effectively manage relationships within the industry. Courses cover communication styles, client interactions, role relationships, trust building, conflict management, and mastering multigenerational dynamics. Interactive elements and assessments ensure comprehensive understanding and practical application.

1. **Personal Time Management**
2. **Customer Management** – Balancing Priorities
3. **Communication Excellence:** Strategies for Engaging, Listening, and Resolving Conflict
4. **Sales Basics** – Uncovering Customer's Needs (Active Listening, Listen to Understand, Asking Questions)

8

**TIPS & TRICKS FOR  
MANAGING  
TECHNOLOGY  
LEARNING PLAN**  
2 CE CREDITS

This learning plan helps professionals master technology efficiently, including AI tools. It covers videoconferencing with Zoom and Microsoft Teams, proper etiquette, using multiple monitors, and managing cameras, microphones, backgrounds, and lighting. Additionally, it provides tips and tricks for Microsoft Office and Google Suite, including Excel, PowerPoint, Outlook, OneNote, and calendar management. Interactive elements and assessments ensure practical application and proficiency.

1. **Insurance Technology Mastery** – Zoom & Microsoft Teams, Videoconferencing etiquette, Using multiple monitors, AI Tools, etc.
2. **Mastering Google Workspace and Microsoft Office Tools** – (Excel, PowerPoint, Outlook, OneNote, Bookings/Calendar)

9

**ESSENTIALS OF  
PROFESSIONAL  
EXCELLENCE  
LEARNING PLAN**  
3 CE CREDITS

This learning plan is designed to cultivate professional excellence by focusing on key skills. It includes leading with emotional intelligence, covering topics such as EQ, client interactions, stress management, and team dynamics. Additionally, it covers mastering professionalism and business etiquette, including client and team interactions, dining etiquette, business attire, punctuality, and Zoom/Teams etiquette. The plan also emphasizes efficient workflow mastery, with a focus on AMS, carrier websites, work settings, and document sharing. Interactive elements and assessments ensure practical application and development.

- 1. Leading with Emotional Intelligence**
- 2. Mastering Professionalism and Business Etiquette**
- 3. Efficient Workflow Mastery:** AMS, Carrier Websites, Work Setting, etc.

## Live Monthly Webinars:

### TECHNICAL INSURANCE TOPICS

- ✓ Cyber Insurance
- ✓ COPE
- ✓ Business Income - The Basics
- ✓ Business Income - Developing the Limits
- ✓ Contractor's E&O
- ✓ Management Liability/D&O/EPLI
- ✓ Homeowners


### PROFESSIONAL SKILLS TRAINING

- ✓ Mentoring Within the Agency
- ✓ Emotional Intelligence
- ✓ Professionalism and Business Etiquette
- ✓ Strategic Planning
- ✓ Efficient Workflow Mastery
- ✓ Technology for Insurance
- ✓ Google Workspace and Microsoft Office
- ✓ Professionalism and Business Etiquette

**...AND MANY MORE! LET US KNOW WHAT YOUR AGENTS NEED!**

**Contact Us:**

 [Cjones@iianc.com](mailto:Cjones@iianc.com)

 919-377-1654