



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!*

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 been told your first days, weeks or months on the job

► 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.

► 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

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 2

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 3

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 4

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 5

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 6

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

"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



In Person Classroom Training at the MIAA Office, 17 Carriage Lane, Hallowell, ME

SEPTEMBER 24 & 25 [Learn more and REGISTER today](#) LIMITED SEATING!



CE Information

Approved for 7 CEC's in Maine



AGENCY MANAGEMENT
RESOURCE GROUP