



General Insurance Council

Guidelines for Assessing Sales Related, Management and Technical Seminars for Continuing Education Purposes

Determining whether sales oriented education course material will be acceptable for continuing education credit can best be understood by asking yourself the following question, "What portion of the course material will relate to simply increasing sale production volumes and what portion will help to understand insurance and/or provide better advice to clients?"

A seminar may not be approved by simply putting the word "insurance" into the seminar contents. The material must be specific to operating a general insurance brokerage.

Sales Production Seminar

The primary focus of an acceptable sales production seminar **will address** the following:

- how to assess insurance client needs
- how to better communicate insurance products and services to the client
- how to use insurance related examples and illustrations in a sales presentation

The primary focus of a sales seminar **will not** be specific to the following:

- closing sales
- cold calls
- how to maintain a client list
- meeting monthly targets
- prospecting
- recruiting
- selling skills



Promotional or Motivational Seminars

Promotional and motivational seminars **will not** be granted continuing education credit. Some of these seminars include the following:

- maintaining a positive self-image
- motivational techniques and speeches
- need fulfillment
- personal achievement and balanced living
- personal betterment
- stress management
- the art of establishing meaningful goals



Management Seminar

Managing an insurance brokerage requires a broad range of skills. Some of these skills may be obtained from a broad range of sources, however, all approved courses/seminars must be directed to the operation of a general insurance brokerage in order to qualify for continuing education credits. Seminars applicable to other business may not be eligible.

The primary focus of a management seminar **will** include knowledge relevant to the operation of an insurance business.

- accounting
- basic customer service skills
- broker process workshop (standard broker processes of writing new policies, changing policies, renewal sales and claims service)
- business environment, management or organization
- claims – principles and claims management process
- customer service (insurance sales and services)
- dealing with angry customers
- dealing with difficult people
- developing a customer service program for your business
- developing your questioning and listening skills
- economics
- ethical considerations in insurance marketing
- general communication skills
- high cost of employee dishonesty and what business owners can do about it
- how to improve your management skills
- how to use employee feedback in development of service standards
- insurer product software
- law
- legal planning for brokers, how can brokers protect their customers lists once staff and producers leave
- listening skills
- management conflicts (this one may be useful for claims service)
- managing conflicts
- Marshall and Swift/Boeckh evaluation software
- mathematics, statistics and probability (forecasting)
- overcoming objections to price
- privacy legislation
- rules of fair market practices
- selling agency (needs analysis)
- servicing your clients
- SGI Auto Fund Seminar
- SGI New Issuer Training Program
- taxes
- training related to home evaluation software
- workers compensation



The primary focus of a management seminar **will not** include the following:

- communication
- computer training and software presentations
- dealing with change
- human resources (hiring, payroll, job evaluation)
- presentation techniques
- steps to becoming a great boss
- succession planning
- taking control – creating a time management system that works for you



Technical Seminar

The primary focus of a technical seminar **will address** the following:

- Accident & Sickness
- Automobile
- Aviation
- Business Interruption
- Collision repair, understanding the proper use of the insurance product
- Commercial evolution construction and contracting
- Commercial Lines
- Document recovery solutions due to water damage
- Equipment breakdown coverage
- Errors & Omissions
- Farm
- Fidelity/fraud
- Insurance laws and rules
- Introduction of new insurance products
- Loss prevention
- Mold assessment and remediation fundamentals
- MSI and GMS
- Other insurance products encompassed by property & casualty
- Personal Lines
- Policy interpretation
- Reinsurance
- Risk management
- Surety
- Travel Insurance
- Vehicle inspection prior to insuring

The primary focus of a technical seminar **will not** include the following:

- Airbag and restraint systems
- Hybrid and alternative power vehicles, offset risk and liability issues
- Life insurance
- USA insurance products