

## 103. Developing a Corporate POSI

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**Time:** 2 Hours

**Who:** Dot Hedman / Karen Farris

**Where:** RHSB Dallas

### Overview

This activity will provide the new Producer with the basics of gathering the data to complete a Corporate POSI

### Objectives

As a result of this activity Producers will:

- Understand the difference between a Corporate POSI and a Risk Management POSI
- Learn how to use a Risk Management POSI during a research meeting

### Steps

1. Review Data Sources Checklist ( IMPAX File in Sales Folder)
2. Complete Developing a POSI Exercise ( IMPAX File in Sales Folder)
3. Review Lhoist Risk Management POSI
4. Complete a Risk Management POSI on one of your prospects

### Materials

- Material in IMPAX File in Sales Folder

### Follow-Up

- Discuss prospect POSI with Business Development Director during weekly review meeting