

P& C Producer Learning Path at-a Glance

Week 1

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|--|---|--|---|-------------------|
| 1. Licensing 2. Welcome and Tour 3. Human Resources 4. Agency Overview 5. Insurance Industry | 6. Office Set-Up 7. Phones 8. Computer Overview 9. Privacy and Security 10. Accounting 11. LP Start Up Meeting | 12. Reference and Training Tools 13. Working with the Team 14. Setting Expectations 15. Marketing | 16. Principles of Risk Management 17. Property and Casualty Principles | 18. Week 1 Review |

Week 2

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|---|--|-----------------------------------|--|--|
| 19. Sales Process Overview 20. Prospect Planning | 21. Building a Prospect List 22. Business Etiquette | 23. Gathering Prospect Background | 24. Department Overviews 25. Calling to Schedule Appointments | 26. Observe Information Gathering Meeting 27. Week 2 Review |

Week 3

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|---|-----------------------------------|---|--------------------------------|-------------------|
| 28. Initial Call Planning 29. Review Past Presentation | 30. Observe Initial Presentations | 31. Business General Liability Coverage | 32. Creating a Networking Plan | 33. Week 3 Review |

Week 4

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|------------------------------------|--------------------|-----------------------------------|--------------------|-------------------|
| 34. Commercial Automobile Coverage | 35. E&O Prevention | 36. Broker/Agent of Record Letter | 37. Carrier Visits | 38. Week 5 Review |

Week 5

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|--|---|---------------------------|--|-------------------|
| 39. Producer Ethics 40. Licensing Compliance 41. Closing Call Planning | 42. Property Overview 43. Information Gathering Meeting Planning | 44. Observe Closing Calls | 45. Target Account End to End Coaching 1 | 46. Week 5 Review |

Week 6

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|--|------------------------------|--------------------------|---|-------------------|
| 47. Umbrella and Excess Liability Coverage | 48. Business Income Coverage | 49. Submissions Training | 50. Carrier Quotation Review 51. Worker's Compensation | 52. Week 6 Review |

Week 7

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|--------------------------|--------------------------------------|---|-----------------------|---|
| 53. Marketing Job Shadow | 54. Initial Presentation Preparation | 55. Initial Preparation Joint Calls 56. Inland Marine Coverage | 57. Claims Job Shadow | 58. Proposal Development 59. Week 7 Review |

Week 8

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|------------------|--|------------------------------------|------------------------------|-------------------|
| 60. Underwriting | 61. Leading Information Gathering Meeting 62. Pipeline Review | 63. Management Liability Insurance | 64. Broker Selection Process | 65. Week 8 Review |

Week 9

| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|----------------------------------|-------|-------------------------------|-------|----------------------------------|
| 66. Account Executive Job Shadow | | 67. Commercial Crime Coverage | | 68. Leading Initial Presentation |

Week 10 - 12

| Week 10 | Week 11 | Week 12 |
|---|--|---|
| 69. Business Development Plan 70. HR Consulting Overview 71. Specialty Lines 72. Risk Control Job Shadow | 73. Target Account End to End Coaching 2 74. Closing Call Preparation 75. Assist Closing Calls 76. Excess Surplus Lines | 77. Ocean Cargo/Transit 78. International Coverage 79. Month 3 Review |

Month 4 & 5

| Month 4 | Month 5 |
|---|---|
| 80. Assurex 81. Structuring Fee Based Compensation 82. Cross-Selling 83. Employee Benefits Ride Along 84. Producer Reports Book of Business 85. Policy Checking and Delivery | 88. Target Niche Education 89. Book Management 90. Lead Closing Calls 91. Month 5 Review |

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| 86. Premium Audit | |
| 87. Month 4 Review | |