

P& C Producer Learning Path

Name:		Mentor:	
Start Date:		Completion Date	

Day	Hours	Activity	Type
0	40	1. Licensing The producer gets property and casualty license prior to starting.	Self-Study

Month 1
Week 1

Day	Hours	Activity	Type
1	1	2. Welcome and Tour This is an initial welcome meeting with a mentor. It includes a tour of the office and introduction to key individuals	Meeting/Tour
1	3	3. Human Resources and Benefits Enrollment This activity covers basic HR information and all required paperwork is completed.	Meeting
1	2	4. Agency Overview This activity presents a big picture overview of the company history, mission, vision, goals and positioning strategy.	Meeting
1	2	5. Insurance Industry General overview of the insurance industry and local marketplace condition.	Meeting
2	1	6. Office Set-Up Provides producer with the essentials they need to be being productive in the office.	Demonstration
2	1	7. Phones The Producer learns how to use the phone system, set up voicemail and gain remote access to our computer system.	Demonstration
2	2	8. Computer Overview and Set-up Sets up Producer with the computer and email system.	Demonstration
2	.5	9. Privacy and Security Provides an overview of privacy and data security compliance	Meeting
2	2	10. Accounting Review the key reports the producer will need.	Meeting
2	2	11. Learning Path Start Up Meeting This is a first meeting with a mentor to set up the entire learning process.	Meeting with Mentor
3	1	12. Reference and Training Tools Review of the reference and training tools available in the agency.	Meeting
3	1	13. Working with the Team Discusses team roles and responsibility and practices for working with the team.	Meeting with Mentor
3	2	14. Setting Expectations Sets sales expectations and describes the effort and discipline will lead to validation.	Meeting

Day	Hours	Activity	Type
3	4	15. Marketing Introduces the Producer to the functions of marketing.	Meeting
4	4	16. Principles of Risk Management Provides an introduction to risk management and how it is part of our selling process.	Meeting/Self-Study
4-5	8	17. Property and Casualty Principles Presents the principles of Property and Casualty Insurance.	Meeting/Self-Study
5	2	18. Week 1 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week..	Meeting with Mentor

Week 2

Day	Hours	Activity	Type
1	4	19. Sales Process Overview A short overview of the agency's sales process.	Meeting
1	4	20. Prospecting Plan Setting goals, defining opportunities, and identifying market niches. Reviews ideal customer profile for the agency and high opportunity industries and niches	Meeting/ Sales Activity
2	5	21. Building a Prospect List Producers begins building a prospect list and entering it into the computer system.	Sales Activity/ Demonstration
2	2	22. Business Etiquette Reviews the basics of proper business etiquette	Meeting with Mentor
3	8	23. Gathering Prospect Background Producer learns how to gather background information about prospects from their prospect list.	Meeting/ Sales Activity
4	3	24. Departmental Overviews Producers will meet with a variety of departments to get a better overview of the agency and available support.	Visits
4-5	10	25. Calling to Schedule Appointments Producers learns how to and then makes appointments for initial presentations. This activity is repeated each week.	Meeting/ Sales Activity
5	10	26. Observe Information Gathering Meeting Producer observes a mentor or senior producer on 3 to 5 information gathering meetings.	Sales Activity
5	2	27. Week 2 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week..	Meeting with Mentor

Week 3

Day	Hours	Activity	Type
1	4	28. Initial Presentation Planning Producer observes and discusses creating call plans with a mentor or senior producer prior to a first ride-along.	Meeting
1	4	29. Review Past Presentations The purpose of this activity is to review and discuss various types of sales presentations that Producers will have to make.	Sales Activity

Day	Hours	Activity	Type
2-5	12	30. Observe Initial Presentations The Producer observes at least 3 initial presentations with a mentor or senior producer	Sales Activity
3-5	8	31. Business General Liability Coverage Presents Commercial General Liability Coverage and explains the basis for legal liability and the business liability exposure.	Meeting/ Self-Study
5	2	32. Creating A Networking Plan The producer creates a networking plan, including social media. Sets networking targets for the next 6 months.	Meeting/ Sales Activity
5	2	33. Week 3 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week.	Meeting with Mentor

Week 4

Day	Hours	Activity	Type
1	8	34. Commercial Automobile Coverage Covers commercial automobile policies and how to sell it.	Meeting/ Self-Study
2	8	35. E & O Prevention Shows how to identify and prevent potential exposure to error and omissions. The Producer learns how E&O claims occur and how they impact our organization and relations with clients.	Meeting/ Self-Study
4	2	36. Broker/Agent of Record Letter Demonstrates how to draft a Broker /Agent of Record letter and how to explain this letter to a prospect/new account.	Meeting
4-5	3.5	37. Carriers (Meetings/Visits) Producer attends carrier or vendor meetings for a company overview and product updates.	Meeting
5	2	38. Week 4 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week.	Meeting with Mentor

Month 2

Week 5

Day	Hours	Activity	Type
1	2	39. Producer Ethics This activity is designed to help you understand the ethical requirements of our business and the potential impact of your decisions and actions.	Meeting
1	1	40. Licensing and Licensing Compliance This activity discusses requirements for maintaining an insurance License. This includes providing information on how to keep a license in compliance and where to go for assistance.	Meeting
1	4	41. Closing Call Planning Producer observes and discusses creating call plans with a mentor or senior producer prior to a first ride-along.	
2-3	8	42. Property Overview Builds a firm foundation of the underlying principles and terminology of property..	Meeting/ Self-Study

Day	Hours	Activity	Type
		43. Information Gathering Meeting Planning Producer completes the pre-call planning for leading information gathering meetings.	Sales Activity
3-5	12	44. Observe Closing Calls The Producer observes at least 3 closing calls with a mentor or senior producer	Sales Activity
4	4	45. Target Account End to End Coaching 1 End to end coaching of one of the producer's major target accounts	Sales Activity
5	2	46. Week 5 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week.	Meeting with Mentor

Week 6

Day	Hours	Activity	Type
1-2	8	47. Umbrella Coverage and Excess Liability Coverage Provides an overview of Umbrella/Excess Liability Coverage including underlying coverages and reviews exclusions.	Meeting/ Self-Study
2	8	48. Business Income Coverage Provides the basics of Business Income Coverage.	Meeting/ Self-Study
3	8	49. Submissions Training This activity reviews the elements of a complete submission.	Demonstration
4	2	50. Carrier Quotation Review Describes how carrier quotes or policies are presented and what to look for and how to proceed if the quote/policy does not match what was requested	Meeting
4-5	8	51. Worker's Compensation Coverage and Employee Liability Coverage This activity provides an overview of Worker's Compensation and Employers Liability Coverage.	Meeting/ Self-Study
5	2	52. Week 6 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week..	Meeting with Mentor

Week 7

Day	Hours	Activity	Type
1	8	53. Marketing Job Shadow This activity provides hands-on insight into the daily activities of the marketing department.	Job Shadow
2	12	54. Initial Presentation Preparation Producer practices and initial presentation with a mentor.	Meeting
3-5	12	55. Assist Initial Presentations Producer conduct initial presentations with the help of a mentor or senior producer	Sales Activity
3	8	56. Inland Marine Coverage Presents Inland Marine Coverage course builds a firm foundation of the underlying principles and terminology.	Meeting/ Self-Study

Day	Hours	Activity	Type
4	2	57. Claims Job Shadow This activity provides a basic understanding of claims department workflow, carrier functions & process, and the claim review process	Job Shadow
5	5	58. Proposal Development This activity shows the Producer how proposals of all sizes are developed for new clients of all types.	Meeting
5	2	59. Week 7 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week.	Meeting with Mentor

Week 8

Day	Hours	Activity	Type
1	8	60. Underwriting This activity provides the Producer with a first-hand look at the underwriting process.	Job Shadow
		61. Leading Information Gathering Meetings Producer takes the lead on conducting 3 to 5 information gathering meetings.	Sales Activity
2	4	62. Pipeline Review Overall review of the producer's prospecting and networking activities.	Meeting
3	8	63. Management Liability Insurance Describes and discusses management liability products. In addition, this session focuses on key questions to ask and how to identify opportunities to bring in our management liability experts.	Meeting Self-Study
4	1	64. Broker Selection Process This activity will review the broker selection process and how to best position yourself in this process	Meeting
5	2	65. Week 8 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week.	Meeting with Mentor

Week 9

Day	Hours	Activity	Type
1-2	16	66. Account Executive Job Shadow This activity involves learning about the role of an Account Executive observing how AE's interact with clients.	Job Shadow
4	8	67. Commercial Crime Coverage Commercial Crime Coverage analyzes each of the insuring agreements in Insurance Services Office's (ISO's) crime coverage program and explains the purpose and meaning of the various provisions.	Meeting Self-Study
		68. Leading Initial Presentations The producer takes the lead in conducting 3 to 5 information gathering meetings	Meeting Self-Study

Week 10, 11 & 12

Wk	Hours	Activity	Type
10	1	69. Develop Business Plan The purpose of this activity is to proactively put together a business plan to keep the new Producer on track to validation	Sales Activity
10	1	70. HR Consulting Overview This activity provides an overview of HR consulting service and fees.	Meeting
10	2	71. Specialty Lines This activity will inform the Producer on how to learn about the lines of coverage that are often proposed to clients but are not covered elsewhere in the process.	Meeting/ Self-Study
10	8	72. Risk Control Job Shadow The activity provides an overview of the Risk Control department workflow and how Risk Control is presented to clients.	Job Shadow
11	4	73. Target Account End to End Coaching 2 End to end coaching of one of the producer's major target accounts	Sales Activity
11	12	74. Closing Call Preparation Producer practices and initial presentation with a mentor.	Meeting
11	12	75. Assists Closing Call Joint Calls Producer makes closing calls with the help of a mentor or senior producer.	Sales Activity
11	1	76. Excess and Surplus Lines The purpose of this activity is to discuss excess and surplus lines markets and what is available for our agency.	Meeting/ Self-Study
12	4	77. Ocean Cargo/Transit Coverage This activity provides specific training on the topic of ocean cargo/transit coverage and how to sell it.	Meeting/ Self- Study
12	2	78. International Coverage Provides specific training on the topic of international coverage, primary markets that provide coverage and how to sell the coverage effectively	Meeting/ Self-Study
12	2	79. Month 3 Review Meeting This is a weekly meeting with the mentor to evaluate progress to date and to plan out the next week.	Meeting with Mentor

Month 4

Wk	Hours	Activity	Type
13	1	80. Assurex This activity presents how Assurex benefits our clients and prospective clients for both national and international risk and insurance needs	Meeting
14	2	81. Structuring Fee Based Compensation The purpose of this overview is to describe the various types of fee-based compensation, to compare with a commission structure, and to discuss the appropriate opportunities for such a structure.	Meeting
15	2	82. Cross Selling Recaps the cross selling opportunities that the Producer should focus on. The Producer then develops and implements a plan for meeting cross-selling goals.	Meeting

Wk	Hours	Activity	Type
15	24	83. Employee Benefits Producer Ride-Alongs In this activity, the Producer will ride along with at least 5 Employee Benefit Producer on new business appointments or presentations. In this activity, the Producer will learn about cross-selling opportunities..	Ride-Alongs
16	1	84. Producer Reports Book of Business In this activity, the Producer learns how to pull and read productions reports	Meeting
16	2	85. Policy Checking and Delivery The purpose of reviewing the policy is to become familiar with issued policies including verifying accuracy and prompt delivery to clients.	Meeting
16	2	86. Premium Audits This activity explains and reviews a premium audit and how the audit process works. It discusses how audits financially impact our clients and our agency.	Meeting
		87. Target Niche Education Technical training on the niche selecting by the producer.	
16	2	88. Month 4 Review This is a monthly meeting with the mentor to evaluate progress to date and to plan out the next month.	Meeting with Mentor

Month 5

Wk	Hours	Activity	Type
17	2	89. Book Management (Renewal Process) This activity provides an overview of what it takes to properly manage the annual demand of a book of business. They key points include client communication, proper scheduling and how to use in-house resources appropriately.	Meeting
18	12	90. Leads Closing Calls Producer leads closing calls while a mentor or senior producer observes.	Sales Activity
20	2	91. Month 5 Review Meeting This is a monthly meeting with the mentor to evaluate progress to date and to plan out the next month.	Meeting with Mentor