

Industry Overview

Industry

Overview

- Role of carriers
- Your agency's largest carriers
- Types of insurance agencies
- Toughest and most frequent competitors
- Key issues and trends driving the industry nationally
- Key issues and trends driving the industry regionally

Risk Management

- What is risk?
- What types of risk do businesses face?
- What is risk management?
- How do businesses typically manage risk?
- What is the role of insurance?
- Meeting structure
- Success factors
- Tools and templates

Relationship Review/Renewal Meetings

- Meeting objectives
- Pre-call planning
- Meeting structure
- Success factors
- Tools and templates