

P&C Learning Path at a Glance

Month 1 – Week 1

Monday	Tuesday	Wednesday	Thursday	Friday
1. LP Planning	3. Setting Expectations	5. Insurance Industry 6. Property and Casualty Overview	8. Creating a Business Plan	
2. Agency Overview	4. Business Etiquette & Producer Ethics	7. Sales Process Overview		
				9. Marketing 10. Week 1 Review

Week 2

Monday	Tuesday	Wednesday	Thursday	Friday
11. Calling to Set Appointments		12. Commercial General Liability Coverage	13. Umbrella & Excess Liability Coverage	14. Past Presentations
				15. Week 2 Review


Week 3

Monday	Tuesday	Wednesday	Thursday	Friday
16. Observe Initial Meetings with Prospects		17. Dedicated Prospecting Month 1	20. Commercial Property Insurance	<i>Dedicated Prospecting Month 1 Continued</i>
		18. Licensing Compliance 19. Accounting		21. Week 3 Review

Week 4

Monday	Tuesday	Wednesday	Thursday	Friday
22. Creating a Networking Plan	<i>Dedicated Prospecting Month 1 Continued</i>	23. Worker's Comp	24. Commercial Auto	<i>Dedicated Prospecting Month 1 Continued</i>
				25. Month 1 Review


Month 2 - Week 5

Monday	Tuesday	Wednesday	Thursday	Friday
26. Observe Closing Meetings with Prospects 		27. Dedicated Prospecting Month 2 28. Broker of Record Letter	29. Social Media	<i>Dedicated Prospecting Month 2 Continued</i> 30. Review Week 5

Week 6

Monday	Tuesday	Wednesday	Thursday	Friday
31. Ocean/Cargo/Transit	<i>Dedicated Prospecting Month 2 Continued</i>	32. Assist Initial Meetings with Prospects 		<i>Dedicated Prospecting Month 2 Continued</i> 33. Review Week 6

Week 7

Monday	Tuesday	Wednesday	Thursday	Friday
34. Inland Marine	<i>Dedicated Prospecting Month 2 Continued</i> 35. Carrier Visits	<i>Sales and Networking Time</i> 	36. Commercial Crime Coverage	<i>Dedicated Prospecting Month 2 Continued</i> 37. Week 7 Review

Week 8

Monday	Tuesday	Wednesday	Thursday	Friday
38. Cyber Coverage	<i>Dedicated Prospecting Month 2 Continued</i> <i>Carrier Visits Continued</i>	<i>Sales and Networking Time</i> 	39. Business Income Coverage	<i>Dedicated Prospecting Month 2 Continued</i> 40. Submissions 41. Month 2 Review

Month 3 - Week 9

Monday	Tuesday	Wednesday	Thursday	Friday
42. Mechanical Breakdown	43. Dedicated Prospecting Month 3 <i>Carrier Visits Continued</i>	44. Lead Initial Meeting with Prospects		<i>Dedicated Prospecting Month 3 Continued</i> 45. Week 9 Review

Week 10

Monday	Tuesday	Wednesday	Thursday	Friday
46. AE Job Shadow	<i>Dedicated Prospecting Month 3 Continued</i>	<i>Sales and Networking Time</i>	47. Management Liability Overview	<i>Dedicated Prospecting Month 3 Continued</i> 48. Week 10 Review


Week 11

Monday	Tuesday	Wednesday	Thursday	Friday
<i>AE Job Shadow Continued</i>	<i>Dedicated Prospecting Month 3 Continued</i>	49. Assist Closing Meetings with Prospects		<i>Dedicated Prospecting Month 3 Continued</i> 50. Week 11 Review


Week 12

Monday	Tuesday	Wednesday	Thursday	Friday
51. Proposal Development	<i>Dedicated Prospecting Month 3 Continued</i>	<i>Sales and Networking Time</i>	52. Specialty Lines	<i>Dedicated Prospecting Month 3 Continued</i> 53. Month 3 Review


Month 4 - Week 13

Monday	Tuesday	Wednesday	Thursday	Friday
54. Relationship Management Job Shadow	55. Dedicated Prospecting Month 4	<i>Sales and Networking Time</i>		<i>Dedicated Prospecting Month 4 Continued</i>
	56. Structuring Fee Based Compensation			57. Loss Control Job Shadow

Week 14

Monday	Tuesday	Wednesday	Thursday	Friday
<i>Relationship Management Job Shadow Continued</i>	<i>Dedicated Prospecting Month 4 Continued</i>	59. Lead Closing Meeting with Prospects		<i>Dedicated Prospecting Month 4 Continued</i>
	58. Product Recall			60. Surety


Week 15

Monday	Tuesday	Wednesday	Thursday	Friday
<i>Relationship Management Job Shadow Continued</i>	<i>Dedicated Prospecting Month 4 Continued</i>	<i>Sales and Networking Time</i>		<i>Dedicated Prospecting Month 4 Continued</i>
	61. Employment Practices Liability			62. Fiduciary Coverage

Week 16

Monday	Tuesday	Wednesday	Thursday	Friday
63. Claims Job Shadow	<i>Dedicated Prospecting Month 4 Continued</i>	<i>Sales and Networking Time</i>		<i>Dedicated Prospecting Month 4 Continued</i>
				64. Month 4 Review

Month 5 - Week 17

Monday	Tuesday	Wednesday	Thursday	Friday
65. D&O	66. Dedicated Prospecting Month 5	67. Underwriting Job Shadow		<i>Dedicated Prospecting Month 5 Continued</i>
				

Week 18

Monday	Tuesday	Wednesday	Thursday	Friday
68. E&O Prevention	Dedicated Prospecting Month 5 Continued	Sales and Networking Time		Dedicated Prospecting Month 5 Continued

Week 19

Monday	Tuesday	Wednesday	Thursday	Friday
69. Kidnap and Ransom	Dedicated Prospecting Month 5 Continued	Sales and Networking Time		Dedicated Prospecting Month 5 Continued

Week 20

Monday	Tuesday	Wednesday	Thursday	Friday
70. Assurex	Dedicated Prospecting Month 5 Continued	Sales and Networking Time		Dedicated Prospecting Month 5 Continued
				71. Month 5 Review

Month 6

Week 21	Week 22	Week 23	Week 24
72. Dedicated Prospecting Month 6	73. Benefits Job Shadow 74. Premium Audits	75. Pollution and Environmental	76. Month 6 Review

Month 7

Week 25	Week 26	Week 27	Week 28
77. Dedicated Prospecting Month 7 78. International Coverage	79. Coverage Review	80. Sales Review	81. Month 7 Review