



CPIA COURSE OBJECTIVES

The ***Insurance Success Seminar*** training modules have been rated very highly by both producers who have taken them and by participating company representatives. The one-day format and nominal cost to attend each module has made them particularly useful and popular. Following are general descriptions:

CPIA 1 – *Position for Success* - Course objectives: During this program, participants are encouraged to focus on internal and external factors affecting the development of effective business development plans. Factors discussed include a review of the state of the insurance marketplace; analysis of competitive pressures; necessary insurance carrier underwriting criteria; and consumer expectations and understanding. Throughout each section of the workshop material, tips for preventing Errors & Omissions are highlighted and discussed.

CPIA 2 – *Implement for Success* - Course objectives: During this session, participants will be provided with specific tools for analyzing consumer needs; will learn to utilize risk identification techniques to gather pertinent prospect information; will develop skills necessary to assimilate information gathered into a customized protection program; and will participate in exercises designed to promote effective delivery of proven solutions. Throughout each section of the workshop material, tips for preventing Errors & Omissions are highlighted and discussed.

CPIA 3 – *Sustain Success* - Course objectives: This program focuses on fulfilling the implied promises contained in the insuring agreement. Students will review methods of providing evidence of insurance coverage; will discuss policies and procedures for controlling errors and omissions including policy review and delivery, endorsements, claims-processing, and handling of client complaints. This course includes a review of Professional Expectations; the Law of Agency; and Legal and Ethical Standards. Throughout each section of the workshop material, tips for preventing Errors & Omissions are highlighted and discussed.

