



THE ULTIMATE ACCOUNT MANAGER™



VIRTUAL EDITION
A M R G

REACTIVE TO PROACTIVE CUSTOMER SERVICE

This class offers REAL WORLD solutions to the problems faced by Account Managers – too much work, too little time, and too high demands – all with too little enjoyment

- Experienced Account Managers will enhance their skills, productivity & effectiveness
- Newcomers will acquire powerful methods that represent world class customer service
- Everyone learns to reduce errors & omissions exposures developing true career satisfaction
- Learn things you wish you'd been told your first day, week or months on the job

✓ Up to 12 Hrs of CE credit varies by state

✓ \$749 for 6 modules

✓ Includes textbook & additional online resources

✓ Learn & Immediately apply proven practices on the job

ADDRESSING THE NEEDS OF ACCOUNT MANAGERS, THE AGENCIES THEY REPRESENT & THE CLIENTS THEY SERVE

UPCOMING VIRTUAL COURSES

10-12 PT
JULY 27
AUGUST 31
SEPTEMBER 14
OCTOBER 12
NOVEMBER 2
NOVEMBER 30

MODULE 1

The Ultimate Account Manager

- Personality and learning styles
- Critical skills of the UAM
- Essential accountabilities of the UAM
- Develop a career development plan

MODULE 3

Risk Management & Contract Analysis

- Fundamentals & education of the risk management process
- Contract law & its relationship to Insurance policy
- Insurance policy analysis
- Contractual risk transfer

MODULE 5

Effective Communication

- Diversity & Inclusion in the industry
- Active listening & its role in customer service
- Client objections & skills to work through them
- Negotiate for win win results

MODULE 2

Client Value & Desk Management

- Successful desk management & extraordinary customer service
- Chronic backlog & how to eliminate it
- Reduce E&O exposures, Improve customer service & provide greater job satisfaction & accomplishment

MODULE 4

Errors & Omissions Loss Control

- History & evolution of agency E&O claims
- Underlying causes of E&O losses & their cost
- The STOP IT list
- Effective agency procedures

MODULE 6

What Will Be

- Generations In the workplace
- The positive impact of having a more diverse agency
- Current emerging trends & their Impact on the independent agency

For More Information
Contact Us



✉ cheryl@agencymanagement.com

☎ Sharon (908)510-2652
Cheryl (916)956-1760

🏠 Agency Management Resource Group
PO Box 1330
Lincoln, CA 95648