

## 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.



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