



ETP (Employment Training Panel) can fund various types of training programs. Historically, the following training topics have been the most commonly funded types of training for Insurance Agencies. Funding is not limited to these types of training. However, your company can decide what types of training will be provided. Training can be provided in house, by a training agency, or by a third party. Training providers should be California based, unless the training is so unique that a training provider cannot be found in California.

## **INSURANCE AGENCY TRAINING TOPICS**

### **BUSINESS SKILLS**

- Business Grammar
- Benefits Insurance
- Commercial Lines Insurance
- Conflict Resolution
- Effective Meetings and Facilitation
- Project Management Skills
- Problem Solving & Decision Making
- Business Telephone Skills
- Business Writing Skills
- Customer Service Fundamentals
- E-mail Etiquette
- Negotiation Essentials
- Financial Statements for Non-Finance Employees
- Leadership Skills
- Constructive Feedback and Criticism
- Resolving Conflicts

### **COMMERCIAL SKILLS**

- Associate in Commercial Underwriting
- Agency Management Systems
- Customer Relationship Management Software
- Microsoft Office Suite
- Associate in General Insurance
- Associate in Risk Management
- Chartered Property Casualty Underwriter
- Continuous Skills for Insurance Designations
- Loss Sensitive Programs
- Policy Accuracy Checking
- Premium and Loss Summary

- Professional Lines for Commercial Insurance
- Stewardship Reports
- Surplus Lines
- Workers Compensation Audit
- Workers Compensation Experience Modification Factor

### **CONTINUOUS IMPROVEMENT**

- Change Management
- Coaching/Mentoring Skills
- Communication Skills
- Desk Management
- Leadership Skills
- Performance Management
- Selling Skills
- Team Building

### **COMPUTER SKILLS**

- Microsoft Excel – Intermediate
- Microsoft Excel – Advanced
- Adobe Acrobat 9 (2 hr)
- Adobe Photoshop CS5 (2 hr)
- Adobe Illustrator CS5 (2 hr)
- Adobe InDesign CS5 (2 hr)

### **COMMERCIAL SKILLS**

- Certified Employee Benefits Specialist (2 hr)
- Registered Professional Liability Underwriter