



Agency Management Institute

Dec. 6-7, 2023

GoToWebinar

Agenda

Wednesday, Dec. 6, 2023

7:45 - 8 am **Join the Webinar**

8 am - 12:15 pm **Strategic Planning**
What does it take to have a thriving agency? The answer is strategic planning, actions aimed toward agency profitability. Learn about change-management processes, establishing actionable goals, identifying appropriate insurance markets, and conducting essential analyses. Use tools that measure an agency's financial health, including examinations of cash flow, budgets, income statements, and balance sheets — all of which provide the insight required for making effective strategic decisions.
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC
Hartland Insurance Agency
Fenton, MI

12:15 - 1:15 pm **Lunch**

1:15 - 5:15 pm **Agency Talent Management**
Acquire the tools necessary to build and manage today's diverse workforce. Learn how to recruit, hire, and manage personnel who reflect an agency's culture and allow for a more productive and satisfying work environment. Learn how to hire for success, including how to write position descriptions, conduct interviews, train new employees, evaluate performance, and manage separations.
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC

5:15 - 5:30 pm **Exam Briefing**

Thursday, Dec. 7, 2023

8 - 10 am **Managing Agency Client Retention and Acquisition**
Acquire and keep new clients and learn how to meet their expectations. The information provided in this section will teach you how value, vision, and mission statements shape your agency's brand and help you capture and keep clients. Learn how to market for success and maintain fruitful client relationships. Discover how to determine the profitability of an account.
Bobby Shomo, MBA, CIC
Shomo-Madsen Insurance
Marshalltown, Iowa

10 am - 12 pm **Managing Agency Technology Utilization**
Learn how to evaluate existing technologies to determine how to effectively engage with clients and insurance companies. This section will help you learn how to select and implement the tools and technology that support your agency's workflows, standards, and procedures — the foundations for profitable growth.
Bobby Shomo, MBA, CIC

12 - 1 pm **Lunch**

1 - 2 pm **Technology Utilization (cont'd)**
Bobby Shomo, MBA, CIC

2 - 5 pm **Ethical Responsibility**
Learn the relevance of professional ethics in the workplace and the legal duties an ethical agent, agency, and insurance company are responsible for. Understand how unfair trade practices influence ethical behavior, and how missteps can lead to errors and omissions. This section will provide you with the foundations of ethical behavior, steps in ethical decision-making, and the process of establishing a code of ethics.
Bobby Shomo, MBA, CIC

EXAMINATION

CIC examinations must be taken online through your PROfile page in the week following the class, beginning Monday at 12:01 a.m. through Thursday at 11:59 p.m. Exam takers must submit a proctor request prior to the end of the class through their PROfile page. For more information on selecting a proctor and taking the online exam, visit scic.com/proctor-monitor-rules.

All times assumed CST unless otherwise noted.

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ADA

We work hard to make our programs accessible to all. If you need accommodations, simply call MAIA at 573-893-4301 or email maia@moagent.org.

CE Credits

This class is filed in all states and approved for 13 general and 3 ethics continuing education credits in Missouri. If you have any questions, including CE credits in other states, please contact The National Alliance at alliance@scic.com.

Cancellation Policy

You will not receive a refund or transfer credit if you do not notify us before the start of the event. All cancellations and transfers must be received in writing. **Refunds:** A 90% refund applies if cancelling more than two weeks prior to start of event; 75% refund if cancelling fewer than two weeks before the event. **Transfers:** A \$30 transfer fee will be assessed on any CIC transfer made within two weeks of the program. Transfers may only be made to another MAIA course. Student must indicate a transfer course within two weeks of cancellation, or appropriate percentage of tuition will be refunded.

PROFILE

Your PROfile displays all of your National Alliance professional education information, including Alliance member #, when your next update is due, membership dues status, CE certificate, course history, new program offerings, contact and logon information, and suggested reading materials. *Please note that it will take 4-6 weeks for your attendance to be reflected on your PROfile.*

Requesting an Extension

In order to request an extension on your CIC update, please contact The National Alliance at alliance@scic.com.



Agency Management Registration Form 2023

(One registration form per person. Form may be photocopied for others.)



I wish to attend the CIC Agency Management Institute to be held Dec. 6-7, 2023 on GoToWebinar.

Note: You can also register online at www.moagent.org/edcalendar.

Name _____ Name for badge _____

Title _____ Designation(s) you hold: ACSR CISR CIC CLU CPCU AAI LUTCF Other: _____

Date of Birth _____ National Producer Number: _____

Which best describes your role? Owner/Principal Agency Mgr. Producer Acct. Mgr. CSR IT Co. Rep Other: _____

Agency/Co. _____ Street Address _____

City/State/ZIP _____

Phone _____ Email _____

Type of Entity: Retail Agency Insurance Co. MGA/E&S Agency Vendor Other _____

SEMINAR PRICE is \$420

Fee includes CE credit reporting fees for participants.

VISA MC AmEx Disc. Card #: _____ Ex. Date _____ Verification Code _____

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Or make checks payable to MAIA. **(Payment must be sent with this form)**

Mail or fax to Missouri Association of Insurance Agents, 3315 Emerald Lane, Jefferson City, MO 65109, Fax: 573-893-3708.

Questions? 573-893-4301.