



Agency Management

February 19-20, 2025

GoToWebinar

CLASS OVERVIEW & TOPICS

Discover the foundations of strategic planning inside an organization and the steps required to attain growth. You will learn how to apply the management ideas, methods, and practices required to run a profitable insurance agency in the CIC Agency Management course. Leave the session prepared to put profit-boosting techniques into practice.

Agenda

Wednesday, Feb. 19, 2025

- 7:45 - 8 am **Join the Webinar**
- 8 am - 12:15 pm **Strategic Planning**
Managing change, establishing actionable goals, identifying appropriate insurance markets, and conducting essential analyses.
Robert Shomo, MBA, CIC
- 12:15 - 1:15 pm **Lunch**
- 1:15 - 5:15 pm **Agency Talent Management**
Learn how to recruit, hire, and manage personnel who reflect an agency's culture and allow for a more productive and satisfying work environment.
Robert Shomo, MBA, CIC
- 5:15 - 5:30 pm **Exam Briefing**
Ed Consultant: *Sam Bennett*
CIC, CPRM, CPIA, AFIS, CRIS, TRIP

Thursday, Feb. 20, 2025

- 7:45 - 8 am **Join the Webinar**
- 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.
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC
- 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.
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC
- 12 - 1 pm **Lunch**
- 1 - 2 pm **Managing Agency Technology Utilization (continued)**
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC
- 2 - 5 pm **Ethical Responsibility**
How unfair trade practices influence ethical behavior and how missteps can lead to errors and omissions.
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC

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 <https://www.riskeducation.org/proctor-monitor-rules/>

All times assumed CST unless otherwise noted.

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