



IIABNY'S TRAINING TRACKS

IIABNY has developed these training tracks to help insurance agents and brokers integrate a new staff member or help to cross-train a current employee to a new position. We have provided direct links to relevant resources available on our website as well as related industry websites. As we continue to add new programs and resources, additional training options will be added.

In order to effectively train a new agency employee, the agency supervisor can use the links provided in the table to find more details about the program and/or resource.

Contact Kathy Lawler
e: klawler@iiabny.org
p: 800-851-8853 x218



Administrative

SKILLS TO FOCUS ON:

Professional Communication, Customer Service, Business Writing, Time Management, Errors & Omissions

TRAINING

Online training package available through IIABNY/New Level Partners:

▶ [\(15\) Business Skills Course Topics](#)

▶ [Purchase a Package](#)

- On-demand & interactive
- Each takes 45 minutes on average
- Access to content for four months
- Assessments to reinforce learning
- Progress reports available

PRE-LICENSING

Not applicable

LICENSING

Not applicable

PROFESSIONAL DEVELOPMENT

Take series of on-demand webcasts from IIABNY's education partner, ABEN (Agents & Brokers Education Network) to continue development of critical skills:

- Recorded webinars range anywhere from 75-120 minutes per topic
- Can be taken anytime (24/7) to fit into busy schedules

▶ [Find a Personal Time Management Workshop](#)

▶ [Find a Relationship Management Workshop](#)

▶ [Find a Verbal Communication Skills Workshop](#)

ADDITIONAL RESOURCES

Online Customer Service guide produced by the National Big "I" (IIABA)

- Series of articles, videos, checklists and more
- Focuses on superior customer service, client care approach, retaining customers, being professional and trustworthy

▶ [Access the Customer Service Experience Online Guide](#)



PERSONAL LINES Customer Service Representative

SKILLS TO FOCUS ON:

Homeowners Property & Liability Policies, Personal Umbrella Policy, Personal Auto Policies, Communication Skills, Errors & Omissions, Customer Service

TRAINING

Online training package available through IIABNY/New Level Partners:

- ▶ [\(14\) Personal Lines Coverage Basics Topics](#)
- ▶ [\(6\) General Insurance Topics](#)
- ▶ [\(15\) Business Skill Courses Topics](#)
- ▶ [Purchase a Package](#)

- On-demand & interactive
- Each takes 45 minutes on average
- Access to content for four months
- Assessments to reinforce learning
- Progress reports available

PRE-LICENSING

Individuals seeking an Insurance Producer or Public Adjuster license must complete a PreLicensing course approved by the Superintendent of Insurance and pass the final exam.

▶ [Find a NYS PreLicensing Provider](#) ▶▶

- You will need to select the appropriate license type to find a list of approved providers by county
- Contact the selected provider for their course details and availability

LICENSING

Once PreLicensing is complete, one must pass the state licensing exam given by licensing exam vendor, Prometric in order to obtain a NYS insurance license.

Prometric, Inc.
NY Insurance Exam Registration
7941 Corporate Drive
Nottingham, MD 21236
Telephone: 1-800-324-7147
www.prometric.com

PROFESSIONAL DEVELOPMENT

The Institutes' Accredited Customer Service Representative (ACSR) designation provides practical and relevant customer service skills and technical insurance knowledge. Earning the ACSR designation conveys commitment to excellence and professionalism in customer service.

- ▶ [Details on the ACSR designation requirement](#)
- ▶ [Upcoming ACSR classes offered by IIABNY](#)
- ▶ [Self-study Option \(via The Institutes\)](#)

ADDITIONAL RESOURCES

- E&O loss prevention tools including forms, checklists, sample letters, disclaimers, reference material & more via [IIABNY's E&O TLC \(Total Loss Control\) program](#)
- Wide assortment of helpful articles, videos, blog posts, and Q&As via [IIABNY's Member Answer Center](#)
- Insurance, business and technology articles, sample ISO forms & white papers, via the [Big "I" Virtual University](#)
- Series of articles, videos, checklists and more that focus on superior customer service throughout customer lifecycle, highlight benefits that independent agents provide, handle complaints, grow your book via the [Big "I" Customer Service Experience Online Guide](#)



COMMERCIAL LINES Customer Service Representative



SKILLS TO FOCUS ON:

Commercial Lines Property, General Liability, Workers Comp, Business Auto, Errors & Omissions, Customer Service

TRAINING

Online training package available through IIABNY/New Level Partners:

- ▶ [\(22\) Commercial Lines Coverage Basics Topics](#)
- ▶ [\(6\) General Insurance Topics](#)
- ▶ [\(15\) Business Skill Course Topics](#)
- ▶ [Purchase a Package](#)

- On-demand & interactive
- Each takes 45 minutes on average
- Access to content for four months
- Assessments to reinforce learning
- Progress reports available

PRE-LICENSING

Individuals seeking an Insurance Producer or Public Adjuster license must complete a PreLicensing course approved by the Superintendent of Insurance and pass the final exam.

▶ [Find a NYS PreLicensing Provider](#) >>

- You will need to select the appropriate license type to find a list of approved providers by county
- Contact the selected provider for their course details and availability

LICENSING

Once PreLicensing is complete, one must pass the state licensing exam given by licensing exam vendor, Prometric in order to obtain a NYS insurance license.

Prometric, Inc.
NY Insurance Exam Registration
7941 Corporate Drive
Nottingham, MD 21236
Telephone: 1-800-324-7147
www.prometric.com

PROFESSIONAL DEVELOPMENT

The Institutes' Accredited Customer Service Representative (ACSR) designation provides practical and relevant customer service skills and technical insurance knowledge. Earning the ACSR designation conveys commitment to excellence and professionalism in customer service.

- ▶ [Details on the ACSR designation requirement](#)
- ▶ [Upcoming ACSR classes offered by IIABNY](#)
- ▶ [Self-study Option \(via The Institutes\)](#)

ADDITIONAL RESOURCES

- E&O loss prevention tools including forms, checklists, sample letters, disclaimers, reference material & online tools via IIABNY's [E&O TLC \(Total Loss Control\) program](#)
- Wide assortment of helpful articles, videos, blog posts, and Q&As via IIABNY's [Member Answer Center](#)
- Insurance, business and technology articles, sample ISO forms & white papers via the [Big "I" Virtual University](#)
- Learn about client/prospect operations and create thorough customer proposals via the powerful online client service resource tool, the [Big "I" Virtual Risk Consultant](#)



PERSONAL LINES Producer



SKILLS TO FOCUS ON:

Homeowners Property & Liability Policies, Personal Umbrella Policy, Personal Auto Policy, Errors & Omissions, Negotiation skills, Elevator Pitch

TRAINING

Online training package available through IIABNY/New Level Partners:

- ▶ [\(14\) Personal Lines Coverage Basics Topics](#)
- ▶ [\(6\) General Insurance Topics](#)
- ▶ [Purchase a Package](#)

- On-demand & interactive
- Each takes 45 minutes on average
- Access to content for four months
- Assessments to reinforce learning
- Progress reports available

PRE-LICENSING

Individuals seeking an Insurance Producer or Public Adjuster license must complete a PreLicensing course approved by the Superintendent of Insurance and pass the final exam.

▶ [Find a NYS PreLicensing Provider](#)

- You will need to select the appropriate license type to find a list of approved providers by county
- Contact the selected provider for their course details and availability

LICENSING

Once PreLicensing is complete, one must pass the state licensing exam given by licensing exam vendor, Prometric in order to obtain a NYS insurance license.

Prometric, Inc.
NY Insurance Exam Registration
7941 Corporate Drive
Nottingham, MD 21236
Telephone: 1-800-324-7147
www.prometric.com

PROFESSIONAL DEVELOPMENT

In today's increasingly complex property-casualty marketplace, only producers with in-depth knowledge and strong focus on customer service have a competitive edge. The Accredited Adviser in Insurance (AAI) designation gives you the professional education you need to succeed.

- ▶ [Details on the AAI designation requirement](#)
- ▶ [Upcoming AAI classes offered by IIABNY](#)
- ▶ [Self-study Option \(via The Institutes\)](#)

ADDITIONAL RESOURCES

- E&O loss prevention tools including forms, checklists, sample letters, disclaimers, reference material & online tools via IIABNY's [E&O TLC \(Total Loss Control\) program](#)
- Wide assortment of helpful articles, videos, blog posts, and Q&As via IIABNY's [Member Answer Center](#)
- Insurance, business and technology articles, sample ISO forms, white papers & more via the [Big I Virtual University](#)
- Latest on carrier contract language, disclosures and policies via IIABNY's [Carrier Relations page](#)





COMMERCIAL LINES Producer

SKILLS TO FOCUS ON:

Commercial Lines Property, General Liability, Workers Comp,
Business Auto, Errors & Omissions, Negotiation Skills, Elevator Pitch

TRAINING

Online training package available through IIABNY/New Level Partners:

- ▶ [\(22\) Commercial Lines Coverage Basics Topics](#)
- ▶ [\(6\) General Insurance Topics](#)
- ▶ [Purchase a Package](#)

- On-demand & interactive
- Each takes 45 minutes on average
- Access to content for four months
- Assessments to reinforce learning
- Progress reports available

PRE-LICENSING

Individuals seeking an Insurance Producer or Public Adjuster license must complete a PreLicensing course approved by the Superintendent of Insurance and pass the final exam.

▶ [Find a NYS PreLicensing Provider](#) ▶▶

- Select the appropriate license type to find a list of approved providers by county
- Contact the selected provider for their course details and availability

LICENSING

Once PreLicensing is complete, one must pass the state licensing exam given by licensing exam vendor, Prometric in order to obtain a NYS insurance license.

▶▶ [Prometric, Inc.](#)

NY Insurance Exam Registration
7941 Corporate Drive
Nottingham, MD 21236
Telephone: 1-800-324-7147
www.prometric.com

PROFESSIONAL DEVELOPMENT

In today's increasingly complex property-casualty marketplace, only producers with in-depth knowledge and strong focus on customer service have a competitive edge.

The Accredited Adviser in Insurance (AAI) designation gives you the professional education you need to succeed!

- ▶ [Details on the AAI designation requirement](#)
- ▶ [Upcoming AAI classes offered by IIABNY](#)
- ▶ [Self-study Option \(via The Institutes\)](#)

ADDITIONAL RESOURCES

- E&O loss prevention tools including forms, checklists, sample letters, disclaimers, reference material & online tools via IIABNY's [E&O TLC \(Total Loss Control\) program](#)
- Wide assortment of helpful articles, videos, blog posts, and Q&As via IIABNY's [Member Answer Center](#)
- ▶▶ Insurance, business and technology articles, sample ISO forms, white papers & more via the [Big I Virtual University](#)
- Learn about client/prospect operations and create thorough customer proposals via the powerful IIABA online client service resource tool the [Virtual Risk Consultant](#)
- Latest on carrier contract language, disclosures and policies via IIABNY's [Carrier Relations page](#)





NEW TO ROLE Manager

SKILLS TO FOCUS ON:

Recruiting, Hiring, Employee Retention, HR Risk Management

TRAINING

Online, on-demand, interactive training packages available through IIABNY/New Level Partners. Specific to new supervisors/managers on topics such as recruiting, employee retention, performance management & more.

- ▶ [\(5\) Manager's Series Course Topics](#)
- ▶ [Purchase a Package](#)

- Each takes 45 minutes on average
- Access to content for four months
- Assessments to reinforce learning

PROFESSIONAL DEVELOPMENT

The Accredited Adviser in Insurance (AAI) designation program provides insight into business, law, finance, marketing, sales, insurance coverage and insurance agency operations.

- ▶ [Details on the AAI designation requirement](#)
- ▶ [Upcoming AAI classes offered by IIABNY](#)
- ▶ [Self-study Option \(via The Institutes\)](#)

After earning AAI, take AAI 87 to develop your leadership skills & align your agency's operations with its organizational goals and earn the AAI-M designation.

- ▶ [Details on AAI 87](#)

ADDITIONAL RESOURCES

Technology Trends: Stay informed on trends that drive future customer expectations and business opportunities via the [Big "I" Agents Council for Technology \(ACT\)](#)

HR Assistance: Turn to the IIABNY-endorsed Human Resource consulting firm who understands the unique needs of insurance agencies, [Affinity HR Group](#)

Staffing Needs: For supplemental full-time, part-time or project help turn to the IIABNY-endorsed remote staffing firm who engages work-at-home vintage professionals, [WAHVE](#)

Licensing/CE Questions: IIABNY's Education Department is ready and willing to help you and your employees via [e-mail](#) or phone at 800-962-7950, press 3

Errors & Omissions: Access E&O loss prevention tools including forms, checklists, sample letters, disclaimers, reference material & online tools via IIABNY's [E&O TLC \(Total Loss Control\) program](#)

Reaching Diverse Customers: Free webcasts, research worksheets & marketing guides to help create an effective marketing plan via the [Big "I" Diversity Training Series](#)