

# Reach for the Peak of Performance

## ELITE FORCE – BEST PRACTICES PRODUCER ACADEMY

The **Elite Force – Best Practices Producer Academy** trains a select few of the brightest and best brokers to scale new heights in their careers as insurance producers.

A specialized sales training program which inspires brokers who exhibit particular promise, the Academy represents life-long learning in key business-building areas.

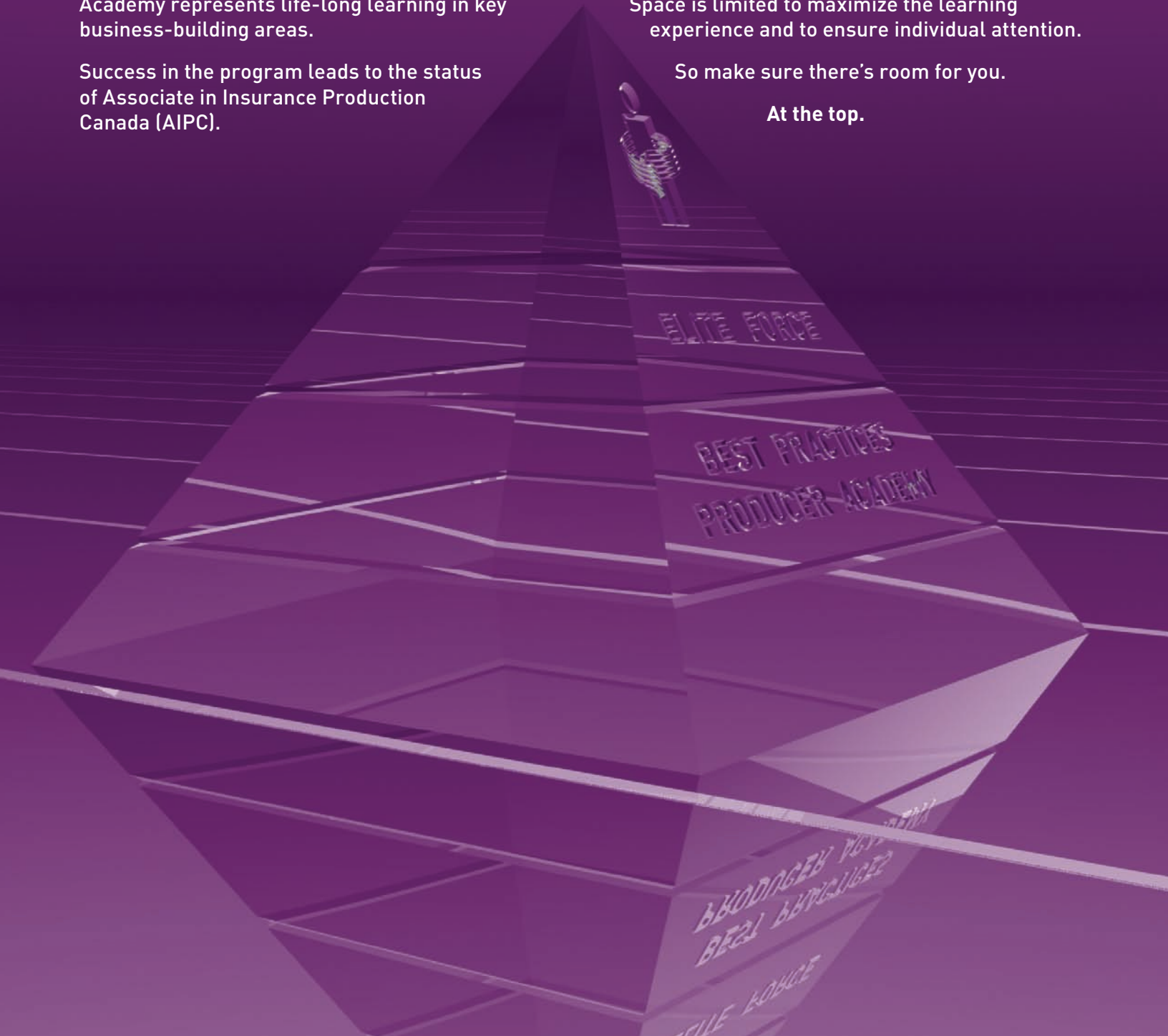
Success in the program leads to the status of Associate in Insurance Production Canada (AIPC).

More importantly, success in this program leads to both new business results and career advancement. And it has been well proven that the cost of the program itself is far outweighed by the new commissions which attendees can earn in their first year alone.

Space is limited to maximize the learning experience and to ensure individual attention.

So make sure there's room for you.

**At the top.**



Producers are essential to the health and continued prosperity of any brokerage. An efficient and effective producer builds important new revenue, raising the brokerage's commission base and adding significantly to the future book value of the company. Those with an aptitude for this kind of work need thoughtful and supportive training to bring out the kind of qualities that consistently land new accounts and the kind of client relationships that foster portfolio expansions.

**The Elite Force – Best Practices Producer Academy** has been tailored to the special needs of the broker profession. Building on each student's own natural abilities, the program will develop confidence and experience in all areas that producers need to shine to be at the top of their game: worthy of being counted as part of the industry's Elite Force and the status of **Associate in Insurance Production Canada (AIPC)**.



While the advantages of top producer skills will be evident to those eager to build serious career credentials for themselves, there are numerous benefits to an employer too. The initial investment in tuition is recovered quickly and provides satisfying returns for years to come. In addition to increasing

revenue, a more knowledgeable and professional salesperson will also add value to the overall reputation of the brokerage, building high customer satisfaction and loyalty.

### Who Should Take This Program?

If you aspire to being in the higher echelon of insurance producers in the country, you are a candidate for the Producer Academy. Likely you are already a highly valued employee and display management potential. Perhaps you are already a producer but have a sense that you need to hone your skills or polish your sales approach.

This life-changing program is for producers of any sized brokerage, specializing in commercial or personal lines, and serving urban or rural communities.

### Benefits to Brokers

The breadth and depth of learning students acquire at the Producer Academy through direct teaching by industry experts, reference materials, case studies, real-life application and mentoring will provide knowledge and experience that will serve them and their brokerages for years to come:

- Effectively set, track and measure goals
- Understand, identify and improve interactions with different personality types
- Improve ability to identify and reach target markets
- Build confidence in conducting sales calls and presentations
- Manage time, stress and conflict
- Develop stronger relationships with customers
- Negotiate win-win solutions in closing sales

Furthermore, graduates of the Producer Academy enjoy an ongoing network of mutual support that continues to inform and inspire.



## Benefits to Employers

The investment made in sponsoring a student will return handsome rewards over time. In fact, most brokerages realize ten times the cost of the program within a year in increased commissions. When you factor in the cumulative commissions over five years, the immediate benefits become crystal clear. The book value of the brokerage could well increase by one hundred times the initial investment (based on 2.5 times revenue).

### Incremental Commissions Based on Average Program Graduate Results

|        | <i>New<br/>Commissions*</i> |   | <i>Renewal<br/>Commissions</i> |   | <i>Total<br/>Revenue</i> |
|--------|-----------------------------|---|--------------------------------|---|--------------------------|
| Year 1 | \$ 50,000                   | + | N/A                            | = | \$ 50,000                |
| Year 2 | \$ 50,000                   | + | \$ 44,500                      | = | \$ 94,500                |
| Year 3 | \$ 50,000                   | + | \$ 84,105                      | = | \$ 134,105               |
| Year 4 | \$ 50,000                   | + | \$ 119,353                     | = | \$ 169,353               |
| Year 5 | \$ 50,000                   | + | \$ 150,724                     | = | \$ 200,724               |

*\* New and renewal commissions based on 89% retention*

Added to such impressive results is the producer's ability to work more co-operatively with staff and management and the delivery of the highest professional service level to clients. Producer Academy graduates help the brokerage to:

- Develop a disciplined approach to goal setting, prospecting and business development
- Improve customer satisfaction through enhanced customer relationships
- Reduce errors and omissions losses through better communication with customers
- Develop more motivated, confident and results-oriented producers
- Improve the bottom line
- Present a more professional image to clients, prospects and other brokers
- Build and promote a best practices sales culture
- Employ producer skills development as a key strategy in succession planning and broker perpetuation

## Program Principles

The Elite Force – Best Practices Producer Academy is not your typical “ten steps to better sales” program. What you will learn is a fully integrated practice of goal setting, prospecting, customer relationship building, negotiating, time and stress management and a host of other skills that will sow the seeds for life-long learning and career development.

You will learn that your future business and personal success is built upon three important principles:

### DISCIPLINE

Discipline is necessary for any higher education. It's not only a question of commitment but also of careful strategic planning to identify business-building areas of opportunity and putting together plans of action using the easy-to-follow process and procedural steps taught at the Producer Academy.

### PERSISTENCE

Persistence is a prerequisite of securing and developing new business. Whether you're searching for a new sales opportunity, rounding an account or establishing yourself as a valued advisor to an important client, you will learn how to properly plan and develop strong stick-to-it qualities that will sustain you over time.

### CONSISTENCY

Consistency is another vital quality. Relationships are built on trust, and a consistent business manner and delivery are part of what separates an Elite producer from an average one. Cold-calling in particular can be unnerving until you have the kind of structure and skills that you'll learn at the Academy.

# ELITE FORCE – BEST PRACTICES PRODUCER ACADEMY

## Twelve-Day Curriculum

The program is composed of a 12-day curriculum, presented as four, 3-day sessions, held each quarter in Toronto, Ontario. Comprehensive reference materials, case studies, team & individual activities and guest speakers enhance the learning experience.



### DAY ONE

#### Perception, Power & Performance

Personal discovery: How personalities affect the sale — how to recognize your client's buying style.

#### Consultative Relationships

Why "the close" is only part of the sale. How to gain long-term customer confidence. Ethics are key!

### DAY TWO

#### The Numbers Game

Goal setting and planning: an in-depth look at how to properly set sales goals.

#### Prospecting

Risk Management basics, prospecting tools, suspects vs. prospects, tracking and reporting.

### DAY THREE

#### Time Management

Learning to manage a salesperson's most critical tool: time.

#### The Perfect Sale

Learn one specific method we've found to help you and your client decide exactly how you can create the perfect sale.

### DAY FOUR

#### Learning as a Lifestyle

Be successful on a long-term basis, and stay on track for life. Persistence — not resistance.

#### Six Steps to Success

This is a review of the psychology of the sales process as it applies to the salesperson, applying the watchwords of the Elite Force: discipline, persistence and consistency.

### DAY FIVE

#### Marketing for Success

Target marketing, data gathering, selling to your underwriter, submissions, vertical marketing, the complete sale.

#### Managing the Sales Process

Best Practices: Creating a Sales Culture, especially adapted for the new producer. How do the best become the best?

### DAY SIX

#### Referrals!

Learn from Roger Sitkin's popular methods to sell by referral only!

#### Conflict and Politics

This two part class covers how to manage conflict and the impact of politics on the independent brokerage system.

### DAY SEVEN

#### War Stories

Case analysis based on the student's actual experiences in the first half. What works? Why?

#### The Presentation

Proposals, rehearsals, polishing presentation skills — what works for various situations.

### DAY EIGHT

#### The Negotiations

Learn how to negotiate with your underwriter and the client.

#### Case Studies & Practice

Practice presentations and proposals, working out the kinks to make the best possible impression on the client when you are back in the "real world."

### DAY NINE

#### Team Work and the Case Analysis

Learn about in depth account analysis involving the sales/CSR team. Identify suspect vs. prospect.

#### The Interview

How to find out what the customer really wants. How and when to walk away!

### DAY TEN

#### Business Etiquette

First impressions, networking, personal style, telephone manners — and why to bother.

#### To Close or Not to Close

When and how to use closes, tips from some of the very best in the sales business.

### DAY ELEVEN

#### The Customer as King

Dealing with tough customers, sales after the sale, listening skills, get them to come back.

#### The Triangle

How the carrier relationship is the critical third leg of the stool, contract issues.

### DAY TWELVE

#### Motivation for the Long Run

Stress Management: What will work best to keep you moving even when it gets tough? Attitude really counts!

#### Your Sales Style

Now that the multitude of sales methods has been explored, which will be your long-term plan?

## What Do Graduates Say?



*"As a recent Producer Academy graduate, I feel the program truly differentiates itself from other sales programs in that it's specifically tailored for insurance production.*

*Producer Academy also provides a simple framework which helps you to develop the tools and best practices essential to becoming a successful producer. I have much faith in the program and would recommend it to anyone serious about taking their career to the next level."*

Sean Murray BBA, CAIB, AIPC.  
Commercial Account Executive,  
WCL Bauld General Insurance,  
Bedford, NS.



*"I have found that the lessons taught are applicable immediately on the job, with each quarter's lessons adding to the skills learned the quarter before. The role playing makes doing the work in real life*

*all that much easier and the goal setting and monitoring provided me with an understanding of the control I have over my own sales. Finally, I have made some great friends in the industry who are also working to grow their business. This has been priceless."*

Heather Hill BA, FCIP, CRM, CAIB, AIPC.  
Commercial Insurance Specialist,  
Howard Noble Insurance Limited,  
Alliston/Barrie, ON.



## What Are Owners Saying?

*"We are pleased and proud that Peter completed the program. It has made a big difference in his approach, confidence levels and sales ultimately. He has just secured one of the largest accounts in all our offices. We can vouch for the program and will be back likely with another candidate in the near future."*

Sal Bagazzoli BA, CIP.  
President, Acumen Insurance Group Inc. Hamilton, ON



# ELITE FORCE – BEST PRACTICES PRODUCER ACADEMY

# 2018 PROGRAM ENROLLMENT FORM



The Producer Academy is open to all brokers. Students must have a mentor/manager at their brokerage, responsible for providing support, guidance and encouragement of goal setting and accountability for production.

All candidates are required to submit:

1. A brief resume outlining their insurance and career experience.
2. A fully completed enrollment (below).

Q1: February 6, 7 & 8, 2018

Q2: May 15, 16 & 17, 2018

Q3: September 18, 19 & 20, 2018

Q4: December 11-13, 2018

The program will be held at the **Novotel Toronto Centre, 45 The Esplanade, Toronto, Ontario.**

Tuition fee for the 12-day program is **\$5,000.00** for those employed by a brokerage that is a member of an IBAC member association, and **\$7,000.00** for all others. 13% HST is additional to tuition fee. Tuition includes all workbooks, reading materials, lunches, morning and afternoon refreshments. Cheque for full amount should be made payable to the **Insurance Brokers Association of Canada.**

Please send full enrollment to: **Sandra Parker, Insurance Brokers Association of Canada, 18 King Street East, Suite 1210, Toronto, ON M5C 1C4.**

Accommodation: Novotel Toronto Centre, Toronto, Ontario – special rates are available when reservations are made in advance through IBAC. All travel, hotel and living expenses are the responsibility of the student.

Cancellations must be made in writing by email or original letter.

Cancellations made on or before December 4, 2017 are eligible for complete refund, less **\$500.00** administration fee.

Cancellations made after December 4, 2017 are not eligible for refund. The entire program fee must be paid.

Substitute students from the same brokerage only, may apply to replace a cancelled student.

Substitutions must be made prior to the start of the program. No substitutions are allowed once the program has begun. A **\$250.00** administration fee must be paid for substitute students.

## ENROLLMENT FORM

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Brokerage: \_\_\_\_\_

Brokerage address: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Number of years in the insurance industry: \_\_\_\_\_ Number of years as a producer: \_\_\_\_\_

Name of brokerage mentor/manager: \_\_\_\_\_

Mentor/manager's email: \_\_\_\_\_

How did you learn about Producer Academy?: \_\_\_\_\_

Student's signature: \_\_\_\_\_ Mentor/manager's signature: \_\_\_\_\_