



Insurance Well Planned is an engaging 2-day experiential program for newly licensed advisors (or those who want to brush up their skills) that takes the knowledge learned through the licensing process and teaches how to apply it with their clients. This program takes the advisor through a sales lifecycle with opportunities to practice skills in a safe, fun environment.

## learning objectives

By the end of this session, participants will be able to:

- Confidently qualify potential clients,
- Take clients through the application, underwriting, and medical processes, and
- Develop a solid insurance book of business.

## agenda

Day 1:

Section	Description	Engagement
Insurance Orientation	Congratulations on obtaining your insurance license! Now what?	<ul style="list-style-type: none"><li>• Large group discussion</li></ul>
Your future clients	This section addresses all areas of prospecting clients.	<ul style="list-style-type: none"><li>• Large &amp; small group discussion</li><li>• Group activity</li><li>• Simulation</li></ul>
Getting to know your clients	This is an important section that addresses the “how” to know your client and the “what” you need to know.	<ul style="list-style-type: none"><li>• Large &amp; small group discussion</li><li>• Group activity</li><li>• Simulation</li></ul>

# Insurance Well Planned



## Day 2:

Section	Description	Engagement
Putting together the “deal”	The client loved your proposal; now you must get them through the application process!	<ul style="list-style-type: none"><li>● Large &amp; small group discussion</li><li>● Individual activity</li></ul>
Negotiating the best deal	Insurance is not a simple product; sometimes, the carriers come back with ratings on our clients.	<ul style="list-style-type: none"><li>● Large &amp; small group discussion</li><li>● Group activity</li></ul>
What’s my piece of this?	Understanding how much your efforts have garnered.	<ul style="list-style-type: none"><li>● Large &amp; small group discussion</li><li>● Group activity</li></ul>
Placing the case	The work isn’t finished yet!	<ul style="list-style-type: none"><li>● Large &amp; small group discussion</li><li>● Group activity</li></ul>

**CE Credits:** 11 Advocis