



**BIG** **i**<sup>®</sup>

INDEPENDENT INSURANCE AGENTS & BROKERS OF  
**SOUTH CAROLINA**

*“Excellence through Education”*

**AIAM**  
ASSOCIATE IN INSURANCE ACCOUNT MANAGEMENT

*The Associate in Insurance Account Management Designation (AIAM) focuses on non-technical skills important in providing excellent customer service to clients.*

### Module 1

6 Hrs. P&C

#### **Understanding Insurance Consumer Needs:**

Examine how personalities affect the office, how to recognize your co-workers’ and customers’ personality and communications styles so that you can increase effectiveness in service provided.

#### **Best Practices in Customer Service:**

Service matters but alone it is never enough. Participants will learn how to build and maintain efficient and effective levels of service.

### Module 2

6 Hrs. P&C

#### **Mastering Time:**

Time is our most precious resource, but one that is often wasted. Participants will complete an in-depth time management profile and learn how to take better control of their time in order to be more productive both professionally and personally.

#### **Organizational Workflow:**

Organized and efficient workflow is essential to an agency’s survival. Good workflows will protect against E&O claims, provide better customer service to insureds, and streamline processes.

### Module 3

6 Hrs. P&C

#### **Negotiating Conflict:**

Learn how to negotiate well with clients and co-workers. Determine how to prevent conflict before it starts, work well with others, and understand both sides of the story.

#### **Professional Relationships in the Agency:**

As an insurance professional, you make a difference to your clients, underwriters and co-workers. Learn how to develop relationships and how they improve the effectiveness and success of the agency.

### Module 4

6 Hrs. P&C

#### **How Not to Get In Trouble With Your Mouth:**

Learn how to reduce the chance of an E&O claim by analyzing the causes of loss and implementing changes to prevent loss.

#### **The Write Stuff:**

Proper grammar and style in all written forms reflects the overall professionalism of the agency, and one wrong or misplaced comma may give an entirely different meaning than the author intended.

### Module 5

6 Hrs. P&C

#### **Regulation, Politics and Polish:**

Our industry is one of the most regulated, and many agents are not familiar with the laws that affect their livelihood. Learn why involvement in political action is important and some of the important business etiquette skills that are crucial for today’s professionals.

#### **Leadership is Everyone’s Job:**

Everyone needs to have basic leadership skills. Learn how the Best Practices materials go beyond supervision to show you how leadership can make a difference every day.

### Module 6

2 Hrs. P&C/3 Hrs. Ethics

#### **Ethics, Yesterday, Today and Tomorrow:**

This course will discuss where the study of ethics originated along with ethical situations that affect us today as insurance professionals.

#### **Changing Attitudes/Creating Opportunities:**

Examine the various approaches to stress and how to determine which approach to use in each situation to reduce overall conflict.

**\*\*\*Go to the IABSC Education Calendar for seminar dates\*\*\***