

March 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
	Management Series: Finances - Financial Statements, Benchmarking & Bonding					
28	29	30	31			

March 22-24

Management Series: Finances - Financial Statements, Benchmarking & Bonding

Facilitated by Eric Walker and Steve Frye

Course Description:

March 22 - Reading & Interpreting Financial Statements: Using financial statements as an essential source of information for assessing and understanding your client's business.

March 23 - Benchmarking Your Brokerage: The eight critical benchmarks and strategies to move your brokerage closer to the industry norms.

March 24 - Bonding Level 2: Learn the key ratios underwriters look at when considering bonding your client. Understand how to assist your client if they miss the financial standards set by bond companies.

April 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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11	12	13	14	15	16	17
18	19	20	21	22	23	24
	Management Series: External Relations and Internal Morale					
25	26	27	28	29	30	

April 19-21
Management Series: External Relations and Internal Morale

Facilitated by Karen Rutherford

Course Description:

April 19 - A Broker's Role in the Community: What are brokers doing to improve their image in their communities? Does it impact profitability or business in any way? Should your staff contribute? Are brokers leveraging their PR dollars?

April 20 - Joining Outside Organizations that Benefit Producers: Do you encourage your producers to join outside organizations? If so, where is the best place to spend your money? What is fundamentally wrong with sales networking groups? What membership makes you the most money?

April 21 - Social Committees and Humour in the Workplace: Managing morale in the office. Is the boss responsible for creating a positive work environment? The most successful offices will share with you the best way to have a great work environment. Will it have an impact on profitability? Will it improve effectiveness or just let the monkeys run the zoo?

May 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
	Management Series: Job Descriptions and Workflows					
16	17	18	19	20	21	22
23	24	25	26	27	28	29

May 10-12
Management Series: Job Descriptions and Workflows

Facilitated by Eric Walker, Steve Frye and Karen Rutherford

Course Description:

May 10 - Job Descriptions: Learn to develop an appropriate human resource organization chart and formal job descriptions for key positions in a brokerage. Understand the importance of these management tools to the success of your brokerage.

May 11 - Workflow 1 - Personal Lines: Make workflow visible, improve communication, understanding and efficiency using flowcharts to document key workflow processes in personal lines.

May 12 - Workflow 2 - Commercial Lines: Make workflow visible, improve communication, understanding and efficiency using flowcharts to document key workflow processes in commercial lines.

June 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7	8	9	10	11	12
	Management Series: Contracts, Claims and Marketing					
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

June 7-9

Management Series: Contracts, Claims and Marketing

Facilitated by Eric Walker and Karen Rutherford

Course Description:

June 7 - Contract Review: Learn what role brokers play with their clients - contract review including lease agreements, construction contracts, etc. Learn what is appropriate and what constitutes practising law without a license. How contract review can be offered as a value-added service. How should brokers set up this aspect of customer service and how should they monitor it to avoid E&O problems?

June 8 - Claims: Learn the five steps of claims protocol. What good brokers do beyond reporting a claim; managing loss ratios; controlling reserves; improving the customer experience. Learn how good brokers prepare their clients for the claims process, provide guidance, set standards and manage the outcomes.

June 9 - Marketing: Using Facebook? Twitter? How much are brokers spending to market their services? What is the best medium to market your brokerage and how much should you spend to promote your producers and your services? Are cost-share co-branding programs a good idea, or do they confuse the consumer about your real independent advice? Public relations - how to leverage what you are spending to maximize the return for your brokerage. Learn how to build community loyalty with your PR dollars.

(No Courses in July or August)

September 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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5	6	7	8	9	10	11
12	13	14	15	16	17	18
	Management Series: Human Resources					
19	20	21	22	23	24	25
	Management Series: Manuals (pre-taped broadcast)					
26	27	28	29	30		

September 13-15
Management Series: Human Resources

Facilitated by Eric Walker, Steve Frye, and Karen Rutherford

Course Description:

September 13 - Employee Reviews & Appraisal: Learn when, where and how to perform effective employee reviews. Employee reviews need the input of at least four different audiences: co-workers, supervisors, the employee and your customers. Learn the best way to ensure that you are looking at the employee in an objective and fair way.

September 14 - Motivation & Compensation - A Round-Table Discussion: Participate in a lively discussion with brokers and managers on the wide variety of motivational tactics and the rules that must apply to compensation.

September 15 - Sales Management & Sales Coaching - A Round-Table Discussion: Owners and managers follow 12 specific steps to ensure they are able to develop producers who enjoy growing the brokerage organically. Check to see if you are providing the elements necessary to encourage success.

September 20-22
Management Series: Manuals

Facilitated by Karen Rutherford

NOTE: This is not a live event. It is a pre-taped broadcast.

Course Description:

September 20 - Policies & Procedures Manuals 1 - Personal Lines: A look at the most common mistakes in brokers' offices today: a lack of effective and efficient routines to ensure the best use of staff time and energy. Individual work styles are overrated in a business that is labour-intensive. Learn how brokers have maximized the workloads in successful brokerages.

September 21 - Policies & Procedures Manuals 2 - Commercial Lines: A look at the most common mistakes in brokers' offices today: a lack of effective and efficient routines to ensure the best use of staff time and energy. Individual work styles are overrated in a business that is labour-intensive. Learn how brokers have maximized the workloads in successful brokerages.

September 22 - Staff Manuals: In addition to the basics, ensure your manuals have the practical guidelines in place to help you manage difficult situations. Make manuals easy for staff to use and update to ensure you have protocols everyone can follow. Commercial Lines: Staff require customized manuals to ensure they can attract new business to your brokerage. Content of a commercial lines manual must include a sales manual component. Learn the 8 key elements necessary to give staff the support they need. Personal Lines: Manuals in personal lines must contain your coverage standards and the sales techniques you want used to achieve your goals. Learn the 5 key elements necessary to support your staff as they grow your business.

October 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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	Management Series: Conflict, Ethics, and Wasting Time					
24	25	26	27	28	29	30

October 18-20
Management Series: Conflict, Ethics, and Wasting Time

Facilitated by Karen Rutherford and Eric Walker

Course Description:

October 18 - Conflict Resolution: Every office and every team needs the skill of conflict resolution. In the absence of conflict resolution, staff will ignore problems, allowing them to grow. Negative gossip will consume office chatter, morale will be negatively affected, and conflict will elevate to a more significant problem over time. Learn the 4 basic steps to work through conflict in a proactive and proven way.

October 19 - Ethics - A Round-Table Discussion: A review of the importance of ethics and professionalism. Practical examples of dealing with ethical issues as they arise in everyday situations faced by brokers.

October 20 - Time Management: Every manager needs to have an appreciation of the most common time wasters in an office environment and how to control them. Recent studies show that staff routinely use 1-4 hours per day for personal business while on your payroll - arguably the biggest form of employee dishonesty in your office. Learn how to spot problems, control time, and maximize efficiencies in your office.

November 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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7	8	9	10	11	12	13
	Management Series: Tax Strategies & The Industry in Hindsight					
14	15	16	17	18	19	20
21	22	23	24	25	26	27
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November 15-17

Management Series: Tax Strategies & The Industry in Hindsight

Facilitated by Derek de Gannes, Karen Rutherford, and Steve Frye

Course Description:

November 15 - Tax Update 2010: Personal and corporate tax planning tips for the 2010 tax year.

November 16 - Selling Your Brokerage - Tax Strategies: Sale transaction structures - avoid the pitfalls and plan ahead.

November 17 - The Year in Review: A candid look back at the highs and lows of 2010 in the property and casualty insurance industry. Interact online with your panel of peers.

December 2010						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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5	6	7	8	9	10	11
	Management Series: Retirement & Estate Planning					
12	13	14	15	16	17	18
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December 6-8
Management Series: Retirement & Estate Planning

Facilitated by Derek de Gannes

Course Description:

December 6 - Estate Planning 1: The nature of estate planning, its significance, objectives, and process. Estate planning techniques that will preserve your wealth.

December 7 - Estate Planning 2: Estate planning techniques to preserve your wealth continued. The importance of a Will in estate planning.

December 8 - Pensions & Your Retirement (RRSPs, RPPs, IPPs, RRIFs): The ins and outs and benefits of pension plans available to owner-managers.