



Agency Management Institute

August 18-20, 2021

Adams Pointe Conference Center
Blue Springs, Mo.*

*MAIA will continue to monitor current conditions relating to COVID-19, and if we determine that it is inadvisable to conduct an in-person class, this course will be offered in a webinar format.

Agenda

Wednesday, August 18, 2021

- 7:30 - 8 am **Registration**
- 8 am - 12:15 pm **Strategic Planning**
What does it take to have a thriving agency? The answer is strategic planning, actions aimed toward agency profitability. Learn about change-management processes, establishing actionable goals, identifying appropriate insurance markets, and conducting essential analyses. Use tools that measure an agency's financial health, including examinations of cash flow, budgets, income statements, and balance sheets — all of which provide the insight required for making effective strategic decisions.
Mary A. LaPorte, AINS, CPCU, LIC, CIC, CPIA
LaPorte Consulting, LLC
Delton Mich.
- 12:15 - 1:15 pm **Lunch on Your Own**
- 1:15 - 5:15 pm **Talent Acquisition and Development**
Acquire the tools necessary to build and manage today's diverse workforce. Learn how to recruit, hire, and manage personnel who reflect an agency's culture and allow for a more productive and satisfying work environment. Learn how to hire for success, including how to write position descriptions, conduct interviews, train new employees, evaluate performance, and manage separations.
Mary A. LaPorte, AINS, CPCU, LIC, CIC, CPIA
- 5:15 - 5:45 pm **Exam Briefing**

Thursday, August 19, 2021

- 8 - 10 am **Client Acquisition and Retention**
Acquire and keep new clients and learn how to meet their expectations. The information provided in this section will teach you how value, vision, and mission statements shape your agency's brand and help you capture and keep clients. Learn how to market for success and maintain fruitful client relationships. Discover how to determine the profitability of an account.
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC
Hartland Insurance Agency
Fenton, Mich.
- 10 am - 12 pm **Technology Utilization**
Learn how to evaluate existing technologies to determine how to effectively engage with clients and insurance companies. This section will help you learn how to select and implement the tools and technology that support your agency's workflows, standards, and procedures — the foundations for profitable growth.
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC
- 12 - 1 pm **Lunch on Your Own**
- 1 - 2 pm **Technology Utilization (cont'd)**
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC
- 2 - 5 pm **Ethical Responsibility**
Learn the relevance of professional ethics in the workplace and the legal duties an ethical agent, agency, and insurance company are responsible for. Understand how unfair trade practices influence ethical behavior, and how missteps can lead to errors and omissions. This section will provide you with the foundations of ethical behavior, steps in ethical decision-making, and the process of establishing a code of ethics.
David Walker, CIC, CRM, ARM, AAI, LIC, CAWC

Friday, August 20, 2021

- 8 - 10 am **Examination**

ADA/Dietary Requests

We work hard to make our programs accessible to all. If you need accommodations, simply phone MAIA at 573-893-4301 or email Elyse at ewrigley@moagent.org.

Please notify us in advance if you have any special dietary requirements.

Cancellation Policy

You will not receive a refund or transfer credit if you do not notify us before the start of the event. All cancellations and transfers must be received in writing. Refunds: A 90 percent refund applies if cancelling more than two weeks prior to start of event; 75 percent refund if cancelling fewer than two weeks before the event. Transfers: A \$30 transfer fee will be assessed on any CIC transfer made within two weeks of the program. Transfers may only be made to another MAIA course. Student must indicate a transfer course within two weeks of cancellation, or appropriate percentage of tuition will be refunded.

Requesting an Extension

In order to request an extension on your CIC update, please contact The National Alliance at alliance@scic.com.

Location

This institute will be held at the Adams Pointe Conference Center/Courtyard by Marriott, 1400 NE Coronado Dr., Blue Springs, MO, 64014, 816-228-8100. You are responsible for your own hotel reservations. We have special room rates of \$119/night for singles and doubles (this rate cannot be guaranteed for reservations made within 30 days of the class). You must tell the hotel you are with the Missouri Association of Insurance Agents group to get this rate.

CE Credits

This class is approved for 13 general and 3 ethics continuing education credits in Missouri. If you have any questions, including CE credits in other states, please contact The National Alliance at alliance@scic.com.

PROFILE

Your PROfile displays all of your National Alliance professional education information, including Alliance member #, when your next update is due, membership dues status, CE certificate, course history, new program offerings, contact and logon information, and suggested reading materials. *Please note that it will take 4-6 weeks for your attendance to be reflected on your PROfile.*



Agency Management Registration Form 2021

(One registration form per person. Form may be photocopied for others.)



I wish to attend the CIC Agency Management Institute to be held Aug. 18-20, in Blue Springs, Mo.

Name _____ Name for badge _____

Title _____ Designation(s) you hold: ACSR CISR CIC CLU CPCU AAI LUTCF Other: _____

Date of Birth _____ License Number: PR _____ National Producer Number: _____

Which best describes your role? Owner/Principal Agency Mgr. Producer Acct. Mgr. CSR IT Co. Rep Other: _____

Agency/Co. _____ Street Address _____

City/State/ZIP _____

Phone _____ Fax _____ Email _____

Type of Entity: Retail Agency Insurance Co. MGA/E&S Agency Vendor Other _____

Is this your first CIC Institute? YES NO Is this your last CIC exam? YES NO

SEMINAR PRICE is \$435 or \$415 Early Bird Discount*

*Early Bird Discount price applies to registrations received at least two weeks prior to seminar date. Fee includes materials, breaks and CE credit reporting fees for participants. Note: You can also register online at www.missouriagent.org.

VISA MC AmEx Disc. Card #: _____ Ex. Date _____ Verification Code _____

Billing Address _____ Cardholder Sig. _____

Or make checks payable to MAIA. (Payment must be sent with this form)