

IIAT Mentor's Guide

Part Eight

The introduction to Part Eight is intended to inspire and motivate the new employee to look beyond what's right in front of them. As their mentor, you can play a significant role in helping them grasp true extent of valuable ideas and resources available for them to move beyond a job and into a successful professional career. To build upon the oil well analogy of the text, they just need to drill a bit deeper.

Professional Development Resources

Here we introduce various tools available to employees to pursue continued growth in their careers. The purpose of this section is not to tell them what to do. Rather, it is to give them an idea of what's out there and allow them, with your assistance, to decide the combination of resources they feel will most benefit them.

NOTE: The employee may be overwhelmed at the amount of valuable information presented to them to help in their professional development. As the old story goes, "How do you eat an elephant? One bite at a time. Remind them that the important thing for them at this point is simply to take those first bites.

For each of the listed resources, the student guide discusses its advantages and disadvantages. If you would like to review the subjects and current availability these various resources prior to sitting down with your employee, here is the online path provided for each in the student materials.

Classroom seminars



iiat.org

Education/Training

Class Schedule

Enter your city (and date, if desired)

Conferences and conventions



iiat.org

IIAT Member Community

Events/Conferences

Online seminars



iiat.org

Education/Training

Education Online

Choose WebCE or VU Online

Course Catalog

Texas

Textbooks/manuals

Your agency no doubt has a library of books, manuals, CD's, and videos that have been used by others in their professional development endeavors. Make sure your employee knows where these materials are located.



iiat.org

Education/Training

Audio/Video Materials

Professional designation programs

These programs are a great way for new employees to kill several birds with one stone. Your agency may support certain designation programs that offer technical knowledge, sales/marketing training, customer services training, etc. Many of these programs will satisfy agents' continuing education requirements. Plus, they might enjoy having all of those cool letters after their name!

The training guide offers a detailed description of one such designation (Accredited Adviser in Insurance). Discuss with your new employee the designation programs your agency currently supports as well as others in which they may be interested.

The exercise in this section requires the employee to follow the InfoCentral path below:

iiat.org

Education/Training

ACSR Program



Professional insurance industry organizations

The exercise in this section directs the new employee to the website of the National Association of Insurance Women, an established professional insurance organization. Review with your employee the information they discovered on the site and how this or a similar organization would be beneficial to them.

Community and service organizations

This section educates the new employee on the professional development benefits of joining a community service organization. They may need to be reminded (especially producers) that they are not joining these organizations to add to their prospect lists and make sales.

An exercise in this section encourages the employee to research and discuss with you any organizations they may want to join, along with how it will effect the employee's time and workload.

Where to Start

The remainder of Part Eight offers two suggested professional development training tracks: One track is for employees whose primary role is service; and the other is for employees whose primary role is sales. Because of the wide variety of possible training resources available, and the need to constantly adjust for updated needs, the tracks are presented in the form of a checklist. We recommend you regularly turn to IIAT.org for updated offerings and new possibilities.

You and your employee may decide a better approach is some variation of one of the tracks provided. Have at it! Feel free to take our tracks as the main highway that will get your employee to their destination, but that doesn't mean there aren't interesting and valuable side roads and possibly even a few shortcuts you would prefer they explore. There may also be items they have completed in the past which you can safely check off and move on. The key is simply to set a definite track to follow, regularly reviewing their progress towards reaching their agency and personal professional development goals.

The exercise in this section instructs the new employee to take an Agency Staff Diagnostic Course offered for no charge by the Independent Insurance Agents and Brokers of America Big I Virtual University.

To review the course, take the following InfoCentral path:

iiat.org

Education/Training

Education Online

VU Online

Course Catalog

Free Courses

Agency Staff Diagnostic



The course will assist the new employee in completing a personal “inventory” of their current personal knowledge levels compared to those needed to fulfill their individual job responsibilities now and in the future. Based upon this unique personal inventory, the course’s diagnostic tool then automatically creates a “next steps” list of recommended courses available from IIABA’s Virtual University. A key value of this diagnostic is that it goes well beyond the technical insurance coverage classes, also including professional skills training needs such as sales, automation skills, customer service, communications, and management training.

Although the diagnostic tool utilizes the current course catalog of the Virtual University to create the individualized training recommendations, feel free to take the results and fill each step of the list with other training options available via the resources discussed earlier in the Part, such as classroom seminars offered by IIAT. After several of the “next steps” are accomplished, encourage the employee to retake the VU Diagnostic Course for an updated list of suggestions.

As the proverb says, “Well begun is only half done.” While we hope the materials and exercises in this Orientation Guide are an excellent beginning, your new employee will need to be constantly reassured that true success is not the result of a single achievement but the end product of a continuous focus on excellence. Regular encouragement, recognition and, yes, reward of your employee’s ongoing professional development efforts is a key to their long term success in growing beyond a job into a rewarding career in our industry. And we can all use more folks like that!

Onward!

Essentials Class Discount Offer

Congratulations on completing the orientation of your new employee. IIAT would like to help you start your new employee off right in their career development by offering you any Essentials series two-day class (personal lines, commercial lines or life and health) at 50 percent off the normal registration fee. Just complete the information requested below and send this form with your Essentials class registration form to IIAT at P.O. Box 142363 Austin, TX 78714-2363

Agency Name: _____

Mentor Name: _____

Phone No. _____

E-mail _____

New Employee's Name: _____

Essentials Class to apply discount: Personal Commercial Life & Health

What did you find most helpful about using the Orientation Guide?

What suggestions or recommendations do you have for changing it?
