



**MN Independent Insurance
Agents & Brokers Association**

CSR AND PRODUCER BOOT CAMP

**ADVANCE YOUR
INSURANCE CAREER!**

**Call Eric Wilson at
888.450.4676
to learn more.**





AUGUST 15–19, 2016

- Monday–Friday 8:30 am to 5:00 pm
- Bring your own laptop or tablet
- \$795 MIIAB Price: \$675

LOCATION:

Kaplan Professional Education
2051 Killebrew Dr.
Bloomington, MN 55425

The Minnesota Independent Insurance Agents & Brokers Association (MIIAB) and Kaplan Financial Education both know it takes hard work, dedication, and a strong knowledge of your craft to succeed in the insurance industry. That's why we've partnered to provide Insurance Licensing exam prep programs, so you can study for and pass your state licensing exam...the first time.

We've also constructed an Insurance Boot Camp to provide you the opportunity to experience a comprehensive insurance training program beyond licensing. This intensive Boot Camp is designed to give insurance professionals—regardless of experience—the necessary tools, techniques, and skills they need to succeed and thrive in today's insurance industry. As an employee, you'll be more effective, more knowledgeable, and more valuable to your agency. As a job candidate, you'll be more appealing to potential employers.

Launch your career the best way possible by taking advantage of Insurance Licensing exam prep programs from MIIAB and Kaplan, as well as the Insurance Boot Camp. We offer special pricing (up to 15% off) for students affiliated with MIIAB. Please see page 4 for package options and pricing details.

JUMP-START YOUR CAREER!

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to learn more.

WHO SHOULD ATTEND THE BOOT CAMP:

- New hires or potential candidates of insurance agencies
- Customer service representatives
- Independent general insurance agents
- Team members of an existing insurance agency





BENEFITS OF THE CSR AND PRODUCER BOOT CAMP

The Insurance Boot Camp can jump-start any insurance professional's career. From an agency's perspective, it will help any associate to perform at optimum levels. Firms will ultimately reduce the cost and time to get recruits on board in an efficient and effective manner. The program is designed and taught by top insurance producers and managers from across the country, and the entire curriculum follows Kaplan's proven assessment-based core learning science:

Prepare › Practice › Perform[®]. This comprehensive, application-based Boot Camp requires prework, homework exercises, and accountability measures to keep insurance professionals on the path to success.

At the conclusion of the boot camp, participants will be able to:

- Analyze their prospective market
- Effectively market their business
- Prospect and set appointments
- Prepare for and conduct client interviews
- Discover clients' needs
- Close a sale and provide post-sale service
- Build lasting relationships with clients
- Learn how to ask for referrals
- Demonstrate effective sales skills

PREREQUISITES FOR ATTENDING THE BOOT CAMP. PARTICIPANTS MUST:

- Hold a valid insurance license
- Write a one-page statement on why they are selecting insurance as a career
- Complete an online entrepreneurial assessment (provided by Kaplan)



PREMIUM PACKAGE | Live Classroom; Printed

Books; Online Study Tools & Review Exams

Kaplan's most comprehensive study solution, the Premium Package, helps you prepare, practice, and perform on the state exam with expert instruction in a live, traditional classroom. The structured learning environment helps keep you on task and on schedule, while offering direct interaction with expert instructors who have years of industry experience.

	Premium	Essential	Basic Online
Instruction	Traditional Live Class	Online Course	Online Course
License Exam Manual	•	PDF	PDF
State Law Supplement	•	PDF	PDF
Class Notes	•		
InsurancePro™ QBank	•	•	•
Video Library	•	•	
Audio Review	•	•	
Study Calendar	•	•	•
Mastery Exams A & B	•	•	•
Performance Tracker	•	•	•
InstructorLink™	•	•	•
Content Updates	•	•	•
Certification Exam		•	•

ESSENTIAL PACKAGE | Online Course;

Online Books, Study Tools & Review Exams

The Essential Package pairs the structure and interactivity of an online course with the ability to study nearly anywhere, anytime. Prepare, practice, and perform with structured instruction on a flexible schedule. Experience the freedom of an online course, while still having direct access to expert instructors with years of industry experience.

Study Program	Retail Price	MIAB Price - Licensing Only	MIAB Price - Pared With Boot Camp
MN Property & Casualty and Life & Health Premium	\$299	\$269	\$254 + \$675
MN Single Lines Premium	\$199	\$179	\$169 + \$675
MN Property & Casualty and Life & Health Essential	\$179	\$161	\$152 + \$675
MN Single Lines Essential	\$139	\$125	\$118 + \$675
MN Property & Casualty and Life & Health Basic Online	\$149	\$134	\$127 + \$675
MN Single Lines Basic Online	\$119	\$107	\$101 + \$675

BASIC ONLINE | Online Course; Online

Books, Study Tools & Review Exams

Based on our proven learning strategy, **Prepare > Practice > Perform®**, and designed for those who prefer the mobility and flexibility of self-study online, the Basic Online Package includes portable PDFs of the core materials you need.

Boot Camp	\$795	\$675
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DAVID GORECKI

David started teaching insurance, securities, and CE classes for Kaplan Professional in 2005. Previously, he spent 35 years in the financial services industry. David held various management positions for 18 of those years with both insurance and investment companies. He received his psychology degree from DePaul University in Chicago and currently manages 60 classroom instructors who teach prelicensing insurance classes.



RANDY ROSENKRANS

Randy is currently a regulated insurance content specialist, primarily editing and maintaining Kaplan's insurance law supplements. He started as a Kaplan instructor in 2011, teaching life and health insurance licensing classes. Prior to joining Kaplan, Randy has more than 20 years experience with a large multi-line insurance company training agents and registered representatives on insurance, retirement planning, and advanced business planning. Randy has his CLU®, ChFC®, CPCU® designations, and CFP® certification.



PETER A. SALIN

Over Peter's 42-year career with State Farm Insurance, he has worked as an adjuster, agent, agency manager, and agency field consultant. He started and operated his own agency before becoming an agency manager and subsequently an agency field consultant. During his tenure at State Farm, Peter helped recruit, train, and develop over 40 new agents. He also played a key role in training and developing over 200 established agents in the various territories for which he was responsible.



BOB RIECKENBERG

During 45 years in the insurance business, Bob has held multiple positions, including regional vice-president for John Deere Insurance, senior vice-president and director of life insurance operations for Wells Fargo Banks, president of MidCountry Insurance Services, and owner of his own full line insurance business. He has trained agents in both sales and products, and has taught numerous courses for Dearborn, Prosource, and Kaplan.



ROBERT H. LABREE

After graduating from the University of Minnesota, Robert began his career as a tax accountant and moved into financial services in 1982. For over 30 years, he has held positions of management and responsibility in both the investment and insurance industries. Since 2007, Robert has also been an insurance, continuing education, and securities instructor with Kaplan Financial Education.



INSURANCE 5-DAY BOOT CAMP SYLLABUS – CSRS AND PRODUCERS

Day	Hours	Topic	Description
Monday	3	Introduction; Ethics; and Risk Management Overview	Review objectives and required pre-work (personality assessment and career statement). Review specific ethical behavior examples; includes an ethics case study to complete. Risk Management Includes an assessment to be graded followed by discussion.
	4	Sales Process: Activity Management; Prospecting; Appointment Setting	Tracking prospects, converting prospects to sales, successful appointment setting, development of word tracks. Includes various role plays for appointment setting.
Tuesday	7	Sales Process: Preparing and Conducting an Interview, Communication Skills/ Building the Relationship	Relationship building with effective discovery conversations, overcoming objections, how to read body language; how to utilize direct and indirect probing questions. Preparation of 2-3 needs analysis based on case studies.
Wednesday	7	Sales Process: Preparing and Conducting an Interview, Discovery of Needs, Risk Management, and Viable Product Solutions	Discovery conversation and role play. Needs analysis and role play. Setting appointments, conducting interviews, and role play.
Thursday	2	Sales Process: Closing the Sale & Post Sale Service	Review best practices, how to ask for the sale, and the do's & don'ts of the art of closing.
	3	Sales Process: Closing the Sale & Referrals	Design referral processes that work for an agency. Role play to confirm closing the sale and asking for referrals.
	2	Other Insurance Tasks: Claims Service, Questions, and Upselling	Review 3 claim scenarios; policyholder questions; develop word tracks to assist with upselling.
Friday	1	People Skills Presentation #1: The 20 People Skills Needed to Succeed at Work	Review and discuss the top 20 personality skills.



Day	Hours	Topic	Description
Friday	1	People Skills Presentation #2: Ranking Your Top 10 Entrepreneurial Talents	Discuss and rank the attendees' top 10 entrepreneurial skills based on the results of their Gallup EP10 assessment.
	2	People Skills Presentation #3: Behavioral Finance	Presentation of Kaplan's Behavioral Finance course, including a group interaction using the Behavioral Finance card game.
	2	Final Discussion and Wrap-Up	Review, Q&A, complete online survey.

WHAT DO PAST PARTICIPANTS SAY?



The Insurance Boot Camp exceeded my expectations in a big way. And I will say that I think my professional success going forward will largely be because of this experience.

– Stephanie Shatirishvili, Perrine Agency

Whoever came up with these four guys, in terms of being the staff of instructors that would lead the Insurance Boot Camp, they did a great job. The guys each brought something different to the table, so they all had different emphasis on what was most important.

– Zem Davis, Independent Agent