

LIMRA Talent Solutions International

Chartered Insurance Agency Manager Designation

LIMRA's progressive series of learning and development programs provides agency managers with training that will help them identify, recruit, develop, and retain high-performing field agents.

The programs:

- Equip people responsible for basic management tasks with foundational skills at the earliest possible point in their careers
- Ensure that skill development progresses naturally from basic to advanced
- Deliver measurable results and a positive ROI at all levels of sales management
- Drive tangible and effective behavior change

Successful candidates are awarded internationally recognized professional designations as they progress in skills and experience:

- The **Associate Insurance Agency Manager (AIAM)** designation marks the initial step to becoming a manager and preparing the next generation of sales leaders.
- The **Chartered Insurance Agency Manager (CIAM)** designation is the mark of professionalism, competence, and modern leadership in today's insurance marketplace.

LIMRA created the **Chartered Insurance Agency Manager (CIAM)** designation to provide a track for professional development and a benchmark for measuring and recognizing a manager's performance. The candidate for CIAM makes a personal commitment to growth and development as a field manager.

Participants who earn the CIAM designation are able to:

- Understand the requirements of the field manager position, its major components, and how to carry out its responsibilities
- Develop and enhance basic management skills in the critical areas of planning, recruiting, selection, training, and performance appraisal
- Grow in targeted areas such as recruiting, planning, market development, business management, and productivity improvement
- Build long-term, strategic skills for continually increasing productivity and meeting objectives

Target Audience:

- New agency managers who make a personal commitment to growth and development as successful field managers
- Experienced agency and branch managers who want to:
 - Increase agency profitability by mastering and applying advanced recruiting, retention, and business-management skills
 - Acquire the prestigious CIAM designation as a mark of their professionalism, competence, and modern leadership in today's insurance marketplace

Requirements:

- Over the course of five or more years, the candidate must complete the following four courses, in addition to a final thesis to demonstrate proficiency:
 - Pacesetter
 - Agency Management Training Course (AMTC)
 - Agency Enhancement Series (AES)
 - Managing Agency Profitability Seminar (MAPS)

With its rigorous, field-tested, best-practice management-development content and methodologies, the CIAM designation is recognized worldwide as a mark of professional excellence in our industry.

For more information visit <http://www.limra.com/ciam> or contact TalentSolutionsInternational@limra.com

Chartered Insurance Agency Manager Designation

CIAM
Chartered Insurance
Agency Manager

CURRICULUM OVERVIEW

Step A — Orientation to Management

This step helps a newly appointed field manager understand the requirements of the field manager position, its major components, and how to carry out its responsibilities. It requires successful completion of LIMRA's *Pacesetter* course (Usually completed between appointment and 18 months.)

Step B — Basic Skill Development

This step helps a field manager develop and enhance foundational management skills in the critical areas of planning, recruiting, selection, training, and performance appraisal. It requires successful completion of the *Agency Management Training Course* (AMTC). (Usually completed between appointment and 18 months.)

Step C — Operational and Growth Skills

This step helps a field manager grow in targeted areas such as recruiting, planning, market development, business management, and productivity improvement. It requires completion of three *Agency Enhancement Series* (AES) courses, selected by the individual. (Usually completed between 24 and 36 months.)

Step D — Advanced Management Development

This step helps a field manager develop long-term, strategic skills for continually increasing productivity and meeting objectives. It requires successful completion of LIMRA's *Managing Agency Profitability Seminar* (MAPS) (Usually completed between 36 and 54 months.)

Step E — Final Paper/Thesis

Candidates describe how they have applied their acquired skills, theories, and concepts to their agency roles and responsibilities. (Usually completed between 48 and 54 months.)

Step F — Certificate of Professionalism

The primary company verifies that the candidate has met the required standards for service, professional conduct, and ethical behavior. (Usually completed between 54 and 60 months.)

Step G — Eligible Service

The candidate must have at least five years as a field manager. Eligible service is defined as one of the following:

1. Serving as an agency head
2. Spending at least 50 percent of the time in field-management activities and supervising two or more agents recruited during the previous 12 months
3. Serving as a regional field officer (manager of agency managers)

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