



SALES  
LEVEL

A hand is shown turning a blue dial on a gauge. The dial has markings for 'LOW', 'MEDIUM', and 'HIGH'. The needle on the dial is pointing upwards towards the 'HIGH' mark. The word 'SALES LEVEL' is written in large, bold, green letters inside the dial's face.

Online  
Course

A blue circular badge with a dashed border contains the text 'Online Course' in white.

AGENCY OPERATIONS AND



SALES MANAGEMENT

A green circular icon with a target symbol inside is located in the bottom left corner. The text 'SALES MANAGEMENT' is written in red capital letters below the icon.

## Course Overview

This course focuses on insurance agency formation and the environment in which producers work. It describes and applies organizational management principles to the agency environment, reviews how to develop the public image of the insurance agency with an insurance consumer, and proposes solutions to the various issues agency principals and managers face. It covers this through the following broad areas of study:

- Agency Formation and Environment
- Organizational Management
- Agency Sales Management
- Personal Production Plans



## Modules

Module 1: Course Overview

Module 2: Agent's Duties and Remedies

Module 3: Insurance Producers and Agency Law

Module 4: Producer Licensing

Module 5: Insurance Agency Contracts

Module 6: Legal Forms of Organization

Module 7: Operating Affiliations

Module 8: Organizational Management and Planning

Module 9: Organizational Management and Organizing

Module 10: Organisational Management and Leading

Module 11: Organizational Management and Controlling

Module 12: Agencies and Sales Management

Module 13: Sales Management Systems

Module 14: Agency Sales Management Planning-Developing a Process

Module 15: Sales Management Organizational Structure

Module 16: Agency Sales Management Operations-Staffing and Producer Hiring

Module 17: Agency Sales Management Operations-Producer Compensation and Performance

Module 18: Agency Sales Management Case Study

Module 19: Personal Production Plan Process

Module 20: Personal Production Plans Summary

Module 21: Time Management

Module 22: Negotiation

Module 23: Personal Production Plan Case Study

## About Insurance Institute of East Africa

The Insurance Institute of East Africa (IIEA) is a leading provider of insurance education across the various functional areas of the insurance industry and is an approved training provider by National Industrial Training Authority (NITA) under Ref: NITA/TRN/1365.

IIEA has partnered with leading global providers of insurance education to offer a wide range of professional insurance qualifications, designations and certifications developed by industry experts. These partners include the Insurance Institute of America (The Institutes), America's Health Insurance Plans (AHIP), The Digital Insurer (TDI), Cambridge International College (CIC) Britain, Australian and New Zealand Institute of Insurance and Finance (ANZIIF), International Compliance Association (ICA), International Fraud Training Group (IFTG), Frankfurt School of Finance and Management, Academy for International Modern Studies (AIMS) and the Institute of Chartered Shipbrokers. IIEA also offers fraud management programs to the insurance industry in East Africa. These programs are highly regarded across the industry and provide learners with the skills and knowledge to succeed in their careers across functional areas of the insurance industry.



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