

IBAO Certificate  
Program

# Professional Selling for Insurance Brokers

EDUCATION FOR BROKERS BY BROKERS

IBAO  
School of  
Insurance

“  
Finally an insurance sales course that delivers.  
This course will increase your effectiveness  
and differentiate you from your competitors.  
Its common sense approach addresses selling  
skills and strategies that will launch you on  
the road to success!”

**Matthew Calvin**

Haber Blain Insurance Brokers Inc.

“  
The Professional Selling Course teaches  
a selling technique used by many sales  
professionals around the world but in a  
format specifically targeted to Insurance  
Brokers both Commercial and Personal  
Lines. Not a day goes by since taking the  
course that I have not used what I learned.  
I highly recommend this program to any  
Insurance Broker who strives to succeed in  
this competitive Insurance environment.”

**Sophie Hainer**

Insuranceland Inc.

“  
After 27 years of selling insurance I thought  
I had been there and done that. Any seasoned  
Producer or CSR will benefit from learning  
how to select who, what and how to properly  
sell insurance from this course.”

**Robert Horbatuk**

Doug Sykes Insurance Inc.



Detailed information on  
all programs and registration can  
be found on the IBAO website at

**[www.ibao.org](http://www.ibao.org)**

## The IBAO School of Insurance

1 Eglinton Avenue East, Suite 700, Toronto, ON M4P 3A1

Tel: (416) 488-7422 Fax: (416) 488-7526

Toll Free: 1-800-268-8845



## Program Description

Information, expertise and professionalism are now the minimum standard expected of the average sales professional. However, your clientele is evolving and their demands are increasing. Within the ever-changing marketplace and the cheaper "Do It Yourself" option, being average will not sustain you.

To combat the challenges facing producers, account managers, and CSR's the Insurance Brokers Association of Canada (IBAC) in partnership with the Canadian Professional Sales Association (CPSA), developed Professional Selling for Insurance Brokers (PSIB).

Selling insurance coverages is more than overcoming the "price" objection or listing features and benefits. Your buyers are looking for value and a relational sales experience. The PSIB 8 Step Consultative Sales training will provide you with the tools to exceed their expectations.

### The PSIB Seminar trains you to:

- Understand the Psychology of Selling through compliance principles, strategies and tactics.
- Evaluate and develop the essential personality traits for sales success.
- Organizing business creating and applying the rules of prospecting.
- Successfully apply the steps of consultative sales.
- Produce tangible returns by increasing your professional sales expertise to retain customers and expand business opportunities.

## Program Outcomes

You will gain the knowledge of:

- Identifying the main personality traits of successful insurance brokers.
- Setting "Smart" (Specific, Measurable, Achievable, Realistic, Time-Bound) goals.
- Managing your professional development to excel in the evolving selling environment.
- Calculating your return on time invested to better achieve greater productivity.
- Assisting S.W.O.T (Strengths, Weaknesses, Opportunities and Threats) to gain an "overhead view" of your book of business and design strategies of improvement.
- Developing strategies based on a competitive analysis for profit maximization.
- Designing successful selling processes from the first appointment to obtaining the go-forward commitment.

## Program Outline

### Understanding and Managing Yourself

### Business Creation

### The Selling Process

### The First Contact/Visit

### The Presentation

### Building and Managing Your Business

## Seminar Format

### RECOMMENDED FOR

Account managers, CSR's, sales and service staff who communicate with clients or underwriters.

### PSIB SEMINAR

Participants earn their certificate by attending two one-day seminars separated by a six week practical application and remote coaching program. The facilitators of the course will provide you with one-on-one mentorship over the six week gap, making themselves available to answer questions or provide professional advice as issues arise.

### DATES

#### Toronto

Part One: June 19, 2012  
Coaching: June 20 - July 30, 2012  
Part Two: July 31, 2012

### LOCATION

#### IBAO School of Insurance

1 Eglinton Avenue East, Suite 700  
Toronto, ON M4P 3A1

### FEE

\$1,295 per participant - IBAO MEMBERS ONLY  
(Includes session, lunch, materials and coaching program)

### RIBO ACCREDITATION

16 RIBO CE Credits, and completion of this program fulfills the sales component of the Canadian Professional Insurance Broker designation.

### FACILITATORS

Brent Gilbert, BEd, CCIB, CSP  
Glenn White, CAIB, CSP, AIPC

### GRADUATES

Completion of the course fulfills the sales component of the CPIB designation.