



CERTIFIED INSURANCE PROFESSIONAL OF TEXAS PROGRAM

Building Skills for Today's Insurance Professional

Presented in Partnership of the FIWT Education Resource Committee
and Jan Kearbey of Service Lloyds Insurance Company



FIWT Certificate Program

A certificate is a non-degree program designed to provide students with specialized knowledge that is less extensive than, and different from, a college program. A certificate from FIWT demonstrates that the participant has completed a planned, sequential program of study in individual career skills that support the insurance industry and promotes enhanced standards of professionalism.

Name of the Program – Certified Insurance Professional of Texas

The Certified Insurance Professional of Texas (CIPT) program provides a series of essential career skills that support the insurance industry and promotes enhanced standards of professionalism.

To Earn the Designation, Participants Must:

- Complete the six core subject courses (each two hours)
- Complete the six core subject courses within six years after attending the first course
- Maintain continuous FIWT membership
- Certification Application Fee is \$25

To Retain the Designation, Participants Must:

- Recertify every two years by attending one of the following courses:
 - Core subject course
 - Update course (two courses required as updates are 1 hour courses)
 - Maintain continuous FIWT membership

Additional Notes:

- One course to be offered at FIWT mid year and one at FIWT convention
- Updates will be given at both mid year and convention – the same class will be offered at both and at the same time as the CIPT modules course. Updates will be one hour course at \$25 each.
- Courses do not have to be taken in order.
- Membership is required for certification but not for taking courses
- Rotating classes will continue after course completes but may not be given in order
- Code of Ethics for utilization – must be a member to use the designation
- Renewals are needed every two years – total of two hours necessary every two years
- Upon completion will receive a framed certificate and pin.

Course Attendance Fee:

- FIWT Members \$ 50 for each two hour course
- Non Members* \$100 for each two hour course

**Note: FIWT Membership At Large dues is only \$45 annually*

Core Subject Programs:

1. Focus on Customer Service
2. Building Rapport for Effective Problem Solving
3. Keeping Yourself Professional – What Does That Mean?
4. Business Etiquette To Enhance Professionalism (In and Out of The Office)
5. Technology and Tools for Time Management
6. Back to Basics of Business Writing – Spelling, Punctuation, Vocabulary

Update Subject Programs:

- Calming Upset Clients
 - Successful Negotiation Skills
 - Public Speaking Tips and Techniques
 - Basic Understanding of Financial Statements/ Budget Process
 - Basic Supervisory Skills
 - Effective Methods for Hiring, Performance Evaluations & Termination
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Core Subject Course #1 - Focus on Customer Service

Building rapport is the first step in creating a lasting relationship with coworkers and clients. This course is designed to provide basic tools in body language and verbiage that will enables greater and easier communication. There is no greater need to use rapport skills than when tackling a problem. This course also contains tools and techniques to assist the employee in basic problem solving, dealing with difficult and angry clients; learning to listen; and words that work for you and against you in customer service.

- Learning the Language of Rapport
- Matching Styles to Build Rapport
- Characteristics of a Problem
- Problem Solving Made Easy
- Understanding Working Styles
- Complaints—It's Not All Bad
- Difficult Clients Are Still Your Clients

Core Subject Course #2 – Building Rapport For Effective Problem Solving

Building rapport is the first step in creating a lasting relationship with coworkers and clients. This course is designed to provide basic tools in body language and verbiage that will enables greater and easier communication. There is no greater need to use rapport skills than when tackling a problem. This course also contains tools and techniques to assist the employee in basic problem solving, dealing with difficult and angry clients; learning to listen; and words that work for you and against you in customer service.

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Core Subject Course #3- Keeping Yourself Professional – What Does That Mean

In order to succeed and move ahead in any industry, employees need to demonstrate professionalism. Professionalism does not mean wearing a particular style of clothing or having a particular appearance; rather, it means conducting oneself with responsibility, integrity, accountability, and excellence. It includes communicating effectively and appropriately while maintaining productive levels. This course provides basic information in understanding how to perform as a professional.

- How Professional Are You
- Treat Everyone as if they were Your Customer
- Humor—A Success factor
- First Impression
- Staying Positive
- Defining a True Professional

Core Subject Course #4 – Business Etiquette to Enhance Professionalism (In and Out of the Office)

Business etiquette can be tricky, even for the most seasoned insurance professional. Your knowledge of what to do when the occasion arises may just be the edge you need to make the next promotion. Through this interactive program you will walk away with a better understanding of appropriate professional behavior in the workplace.

- Etiquette Relating to Cubicle Space or Offices
- General Office Etiquette
- Top Business Etiquette Faux Pas
- Speaking to Coworkers
- Top Ten Business Etiquette Tips for Dining

Core Subject Course #5 – Time Management and Organization Skills

In today's business environment it is all too easy to lose focus on what is the priority for the day. This course is designed to help employees become aware of how they use their time in organizing, prioritizing, and succeeding in completing the tasks at hand.

- Developing Realistic Plans
- Setting Priorities
- De-cluttering your Office
- Handling Correspondence
- Keeping a Check on Emails
- Recognizing Unnecessary
- Learning to say NO
- Activities and Interruptions
- How to Create Daily/Weekly/Monthly Plans

Core Subject Course #6 – Back to Basics of Business Writing – Spelling, Punctuation and Vocabulary

With the growing use of text messaging and social media, the art of writing business correspondence has been greatly impacted. By using simple, clear, precise language and following a few basic writing rules, employees can become better communicators and enhance their professionalism.

- How to Write for Busy Professionals
- Choosing Words Carefully
- Most Common Business Words
- Keep it Simple
- The Art of Effective Emails
- Persuasive Writing
- Remember Basic Grammar Rules

CIPT Certification Application Form *(Please type or print clearly)*

Candidate Information *(Name as it is to appear on certificate)*

Name _____ Designations _____

Mailing Address _____ Daytime Phone # _____

City _____ State _____ Zip _____

Email _____ Employer _____

Local Association _____ or Member-at-Large

Program Requirements

- Complete the core subject programs comprised of six two-hour segments within six years of the completion of your first course.
 Completion date of **first** core subject course: _____ Completion date of **final** core subject course: _____
 If completed under a name other than your present name, please indicate such name: _____
Evidence of completion for CIPT courses does not have to accompany the application. All information will be verified using course records maintained at FIWT headquarters. You will be notified if there are any discrepancies.
- Continuous FIWT membership through the following local association: _____
 If a portion of your membership was filed under a name other than your present name, please indicate such name: _____

Evidence of qualifying membership will be verified by records maintained at FIWT headquarters. You will be notified if there are any discrepancies.

Business Courtesy

Would you like a letter acknowledging your accomplishment sent to your employer from the State FIWT President?

Yes No If yes, please provide the following information:

Employer: _____ Directed to: _____

Mailing Address _____

City _____ State _____ Zip _____

Processing Fee

Please send the completed application and a check to cover processing in the amount of \$25 to:
FIWT 2831 E. Eldorado Pkwy, Ste 103-192, Frisco, TX 75033

I hereby certify that the information provided on this application is true and correct.

_____ Date _____

Candidate's Signature