

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 18 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)

LL Global, Inc.®



08985-0818 (50700-10-710-48503)



©2018 LL Global, Inc. All rights reserved.