

MASTERING PROSPECTING

A course for all insurance professionals.



COURSE OBJECTIVES

To empower young insurance professionals with the knowledge to grasp and execute the fundamentals of effective prospecting.

To enhance and adapt experienced professionals skills to align with today's current competitive landscape.

DETAILED COURSE OUTLINE

1

The importance of identifying and prequalifying prospects

This topic explains the concept of target marketing along with its benefits, detailing the process of identifying niche markets through techniques such as market segmentation and positioning the advisor's personal brand and products.

We cover in detail:

- Benefits of Target Marketing
- Assessing Financial Needs and Personal Traits
- Defining your Natural Market
- Conducting Market Research & Strategies
- Positioning Methods

2

Understanding the Characteristics of Prospects

This subject elucidates the concept of prospecting within the insurance sector, offering strategies to overcome challenges in successful prospecting. Additionally, it delves into the psychology of the buying process from the perspective of prospects, analyzing the factors that drive purchasing decisions.

We cover in detail:

- Prospect Psychology
- Selling/Planning Process
- Overcoming the challenges of prospecting
- Motivations for Buying

3

Observing Potential Prospects

Explores the process of assessing and selecting prospecting sources. Provides effective methods to assist advisors in obtaining names and contact details of potential prospects within their target markets.

We cover in detail:

- What are Prospect Sources?
- Fundamental Methods of Prospecting
- Tasks to improve effective prospecting
- Lead Generation Systems

DETAILED COURSE OUTLINE

4

Cultivating and Managing Relationships with Prospects

Explores methods through which insurance professionals can enhance awareness of their personal brand and company products/services. Additionally, it examines the effective utilization of pre-approach activities to educate and prompt prospects to enquire into the emotional and financial needs addressed by the your products.

We cover in detail:

- Cultivating Awareness
- Building a level of trust
- Different types of Advertising
- Pre-approach Methods
- Face to Face Methods vs Telephone Methods

5

Efficient Time Management

Centers on goal setting and time management. It elaborates on the principles of setting goals, the distinction between goal setting and problem solving, and the application of structure to achieve goals.

We cover in detail:

- Importance of Setting Clearly Defined Goals
- Practicing Discipline and Perseverance
- Analyzing the effective use of your time
- The traffic light concept - Time Management Zones

6

Ethics in Insurance

Upon completing this topic, the agent/salesman will have a clearer understanding of various issues relating to compliance, ethics and professionalism.

We cover in detail:

- The Golden Rule
- Definition of Ethics in the Insurance Sector
- Five Most Common Ways people compromise their ethics
- Always being a professional

COURSE INFORMATION

COURSE REQUIREMENTS

Completion of the Mastering Prospecting course depends on meeting the following requirements:

Attendance:

In order to qualify for the successful completion of this course, students must have attended all six (6) sessions and miss no more than 20 minutes per session. ***Considerations may be made in the event that class is missed due to unforeseen circumstances.***

Passing Grades:

Students must pass all six (6) quizzes, and any additional coursework that may be given with an overall mark of 70% or more in order to qualify for successful completion of the course.

WHAT WILL YOU EARN?



Master of Prospecting Certification

Upon successful completion of the Mastering Prospecting course, you will be granted with a certificate of completion from TTAIFA.

CONTINUOUS EDUCATION CREDITS

7.5 CREDITS

***FOR LUTCF, FSS AND FSCP
DESIGNATION HOLDERS***

CONTINUING PROFESSIONAL DEVELOPMENT HOURS

4 HOURS

***2 HOURS: OTHER CATEGORY
2 HOURS: ETHICS CATEGORY***

COURSE INFORMATION



Course Duration:

Six (6) Weeks



Class Platform:

*Six (6) Sessions
via Zoom Platform*



Class Length:

Three (3) Hours



Assessment:

*Six (6) Quizzes
via TTAIFA Learning Portal*

FEES & REGISTRATION

The Registration Fee for this course is:



2,200 TTD

Download and complete the form linked below to sign-up for this course. Once completed forward the form to education@ttaifa.com to secure your registration.

**Register via
TTAIFA Website**



**Register via
Enrollment Form**