

INSURANCE TRAINING
AUSTRALIA



Training for the Insurance Industry

Real learning for those serious
about growth

Customer satisfaction | Business growth | Staff retention



insurancetraining.com.au

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Where motivated staff make everything happen

Insurance training can be as simple as an online webinar and a tick box to say it's done. This, however, is not how we do things.

We work with organisations looking to attract and retain staff, grow their business, and really stand out in the industry.

Our interactive and highly engaging training will help you reduce the risk of staff errors and omissions, and free up more of your time as staff become more comfortable managing client queries and selling on their own.

The interactive sessions we offer are split into two principal categories: product training, which focuses on Professional & Financial Lines products, and non-product training, which

focuses on processes, risk management and sales training. Our modules are suitable for insurance professionals of many different levels.

Sessions also include practical exercises and skill-based training which complements your on-the-job training. Our in-depth knowing-sharing approach provides real insight into the industry from a career insurance professional.

We prefer in-person delivery but can also accommodate online sessions.

- ▶ **Free up more of your time**
- ▶ **Deep learning, maximum engagement, real returns**



Oren's expertise and dedication make him an invaluable resource, and his training programs are an asset for anyone seeking to enhance their knowledge and skills in the industry. His commitment to excellence truly sets him apart, and I am grateful for the positive impact he has had on our team. He actively engaged with them, demonstrating a genuine commitment to ensuring everyone's understanding. He took the time to address any questions, fostering an environment of open communication.

Jim
Director at Insurance Broker





Oren is the best industry teacher that you will encounter. I can't recommend him highly enough.

Faith
Account Manager at Insurance Broker



Training Module Samples

To follow are just some of the training modules that can be delivered to your team. Sessions can be personalised to meet your specific needs, and existing modules are updated periodically to ensure they remain current. All sessions are CPD/CIP accredited with NIBA and ANZIIF.

Avoiding Broking Errors & Omissions

CPD / CIP Points: 2.5

Estimated Duration: 2.5 Hours

Claims Made Policies

CPD / CIP Points: 2.5

Estimated Duration: 2.5 Hours

COMPLETE WITH:

- Professional Indemnity | Level 1
- Management Liability | Level 1
- Selling Cyber Insurance
- Cyber Insurance & Cyber Risks

Corporate Structures & Insurance Implications

CPD / CIP Points: 2.5

Estimated Duration: 2.5 Hours

Creating Quality Submissions

CPD / CIP Points: 2.5

Estimated Duration: 2.5 Hours

COMPLETE WITH:

- Avoiding Broking Errors & Omissions

Cyber Insurance & Cyber Risks

CPD / CIP Points: 5

Estimated Duration: 5 Hours

RECOMMENDED PRE-REQUISITE:

- Claims Made Policies
- Selling Cyber Insurance

Management Liability | Level 1

CPD / CIP Points: 2.5

Estimated Duration: 2.5 Hours

RECOMMENDED PRE-REQUISITE:

- Claims Made Policies

Professional Indemnity | Level 1

CPD / CIP Points: 2.5

Estimated Duration: 2.5 Hours

RECOMMENDED PRE-REQUISITE:

- Claims Made Policies

The Policy Renewal Process | Level 1

CPD / CIP Points: 2.5

Estimated Duration: 2.5 Hours

COMPLETE WITH:

- The Policy Renewal Process | Level 2

Selling Cyber Insurance

CPD / CIP Points: 2.5

Estimated Duration: 2.5 Hours

RECOMMENDED PRE-REQUISITE:

- Claims Made Policies



The training was extremely considered, easy to follow and informative. Content aside, Oren's delivery was exceptional, he was engaging and clearly thought about how different people learn.

Tobie
Underwriter and Assistant Manager at Underwriting Agency



The training that Oren provided to our team was concise and thorough. The explanations and examples used made topics easy to follow. The way that the training was delivered was engaging and a comfortable space for questions to be asked. Our staff all responded to the training well and had wonderful feedback.

Adrienne

Training & Development Manager at Underwriting Agency

Couple it with coaching

If you're seeking further guidance to help deliver the best client experience and grow your business, we run coaching sessions for insurance professionals that will enhance your knowledge and elevate your service delivery.

Reward yourself and your staff with the best professional development opportunities; award your customers the expertise that keeps them coming back.



I thought the presentation was very well run, smooth, and informative. Oren was very impressive with knowledge on the topic as well. Would highly recommend to others in the industry.

Max

Account Manager at Insurance Broker

Need a speaker?

We make insurance interesting, by delivering thought-provoking insights to keep your audience engaged!

So much can be learned from just one session. If you have an event coming up, consider booking us in today.

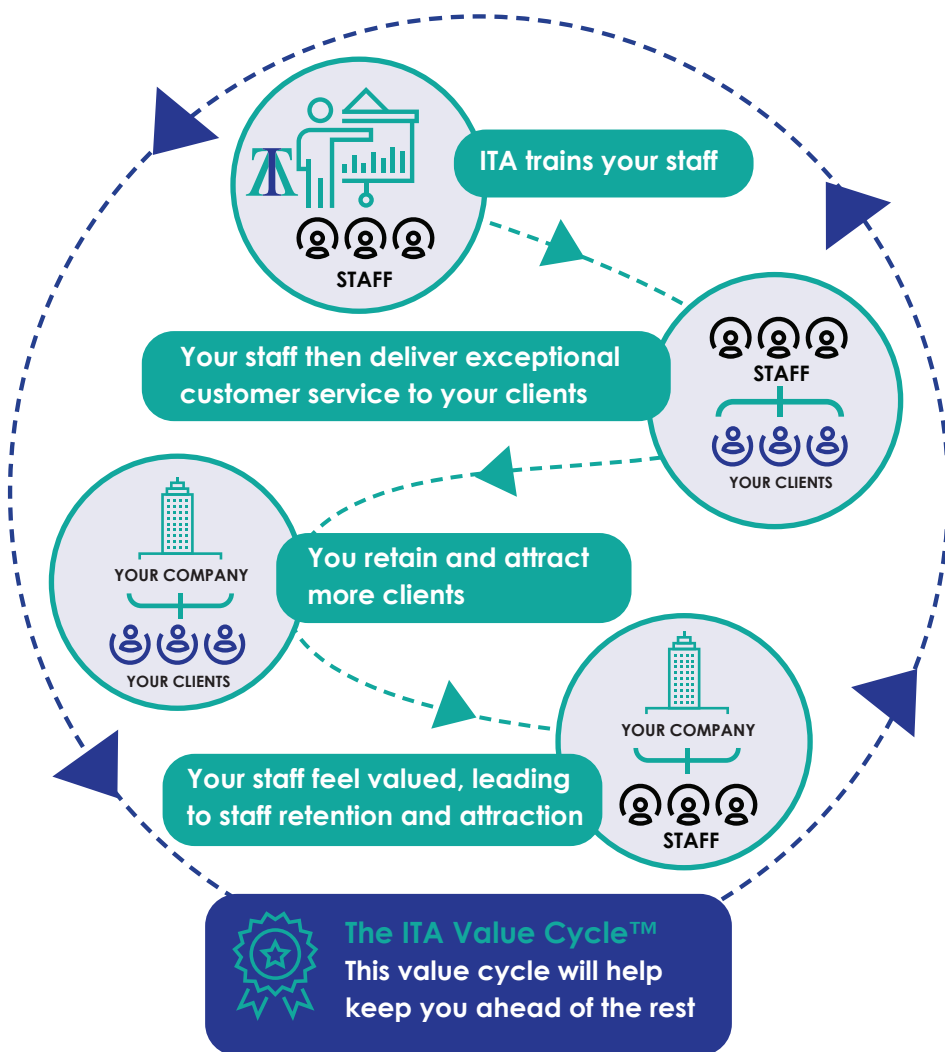


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Why choose Insurance Training Australia?

If you're looking to just tick a training box, Insurance Training Australia isn't for you. But if you're seeking to enhance the professionalism, skills, and confidence of your staff, then you've come to the right place.

We are passionate about the whole learning experience. We want to make you truly competitive in your field and equip you to deliver the best outcomes to your clients. We're also about protecting your most valuable assets – your staff – and enabling them to shine.



Oren has a very rare depth of experience as a professional liability broker and wholesaler in multiple jurisdictions. He is also a passionate believer in improving staff education to improve client service and team culture. Our staff benefited greatly from Oren's highly professional suite of training, and I thoroughly recommend his services to any insurance industry group.

James
CEO at Insurance Broker

What makes us unique?

- ▶ A career broker training brokers
- ▶ A qualified trainer
- ▶ In-person sessions
- ▶ A variety of training methods used to suit different learning styles
- ▶ A focus on building professionalism and self-confidence as well as knowledge
- ▶ Practical exercises and lots of Q&A



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Let's chat!

Reach out to talk about your learning and development needs.

Let's add value to your business!

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About Oren Jacobi, Founder

Teaching and training are a part of Oren's DNA. For over 20 years he has worked in the insurance industry, with brokerages in both Australia and overseas. He'd always felt something was missing in the professional development space and saw a real gap in the market to provide specialised insurance training in a more engaging and interactive way. This is how Insurance Training Australia came to be committed to improving the level of professionalism and confidence of insurance professionals, leading to better client outcomes and a healthier perception of the insurance industry. Oren also works to attract more talent to our industry nationwide.