INSURANCE
ACCOUNT EXECUTIVE
ACADEMY

Crafting high calibre new generation insurance account executives & sales professionals

Wiser Academy
TRAINING THE INSURANCE INDUSTRY
Ofsted Outstanding Provider

01.

What will participants learn

02.

How training is delivered

03.

Residential retreat

04.

Programme details

05.

How this training is unique

06.

Who is eligible to attend

In today's competitive business landscape, the ability to close deals and forge lasting client relationships at the highest levels are not merely skills but a new world mindset.

Account Executive Academy is a training course that is meticulously crafted to empower both seasoned veterans and newcomers in the world of insurance to catapult their performance, amplify their business objectives, and propel individual careers to new heights.

Crescens George
Managing Director

DISCOVER WHAT IT TRULY MEANS TO BE A THRIVING ACCOUNT EXECUTIVE

01: WHAT WILL PARTICIPANTS LEARN

This is a programme shaped by insights from industry leaders who unanimously emphasised that a fundamental cornerstone of our program should revolve around nurturing exemplary workplace conduct and fostering an unwavering commitment to grit, determination, and a growth mind-set. Within this section of the programme participants will discover how to:

Master the Winning Mindset: Unlock the secrets to developing a mind-set primed for success

Break Free from Comfort Zones: Embrace new initiatives with courage, leaving comfort zones behind

Go Back to Basics of Excellence: Revisit the fundamental principles of workplace conduct and expectations

Build a Personal Brand: Learn how to construct and leverage a personal brand to elevate and influence sales and drive business growth

Build Confidence for the Modern World: Forge the contemporary self-assuredness needed for challenges and opportunities of the day

01: WHAT WILL PARTICIPANTS LEARN

Equipping participants with the understanding of client relationships and a fresh approach to sales is essential, as underscored by industry leaders. At the heart of our program lies a dedication to 'selling through service,' placing genuine customer service at the forefront. Within this section of the programme participants will discover:

The Psychology of Connection: Unlock the secrets of understanding customers on a psychological level and adapting their communication to resonate with them

Building Robust Sales Pipelines: Learn the art of constructing effective sales pipelines and mastering the art of prospecting

Strategic Value-Based Selling: Create a blueprint for sales that genuinely connects with client through value-driven approaches

The Power of Remote Selling: Harness the prowess of remote selling techniques, enabling learners to reach and engage clients wherever they are

Social Media Mastery for Social Selling: Unleash the potential of social media platforms as formidable tools for social selling, connecting with clients in an interconnected world

Nurturing Enduring Customer Bonds: Forge enduring and fruitful relationships with customers through proven techniques

01: WHAT WILL PARTICIPANTS LEARN

In response to the resounding call from industry leaders, we've embarked on a mission to cultivate the entrepreneurial spirit as the key to elevating a high-performance mindset and aligning executives with critical business objectives. Within this transformative segment of our program, participants will embark on a journey to uncover:

Entrepreneurial Passion: Ignite the flames of entrepreneurial spirit to fuel creativity, foster innovation, and supercharge problem-solving capabilities

Deciphering the Essence of KPIs: Gain a profound understanding of how Key Performance Indicators (KPIs) are meticulously developed and aligned with the overarching financial goals of the business

Customer Insight & Market Intelligence: Collect, analyse and interpret market intelligence to assess the macro and micro environment of individual customers, to guide the sales conversation appropriately to cater to the motivations of customers and any factors that impact their purchasing decisions.

Profit Maximisation vs. Revenue Generation: Learn the art of distinguishing between revenue and profit and discover strategies to maximise profit

The Profitable Micro-Business Paradigm: Learners will imagine themselves as a micro-business within the larger corporate landscape and uncover the strategies that would make them a profitable entity

02: HOW TRAINING IS DELIVERED

Monthly face-face training session

Monthly training series designed to help learners sharpen their skills, gain new knowledge, and stay up-to-date with industry trends.

This monthly program offers a structured approach to ongoing professional development, delivered through engaging training sessions.

A residential retreat for skill & personal development

Learners will elevate their sales skills with this power-packed one-day residential training event designed to enhance their selling skills, confidence, and supercharge sales performance.

There are two residential days through the course of the programme, once in every four months.

The cost of accommodation is covered within the course fee

Personalised one-on-one coaching support

This tailored coaching service is designed to provide learners with dedicated, individualised guidance and support to navigate life's challenges, enhance their skills, and help realise personal aspirations.

03: RESIDENTIAL RETREAT

Learners will rejuvenate their spirits, rekindle their creativity, and recharge their professional drive at our residential retreat for skill development part of the programme.

This power-packed event will allow learners to enjoy an unforgettable two days away from the everyday grind at our Country Hotel Retreat by enjoying moments of quiet contemplation, engaging in deep conversations with fellow participants, forging meaningful connections with like-minded professionals during our social events and engaging in high-power workshops.

More details about residential training...

03: RESIDENTIAL RETREAT : AGENDA

Discovery Workshops

Throughout the day, learners will immerse themselves in a series of interactive workshops led by expert facilitators. Learners will dive into the art of strategic selling, learn proven techniques to identify and prioritise prospects, craft compelling value propositions, and close deals with confidence.

Evening Fireside Chat

Reflect on the day's learnings and experiences during an informal fireside chat. Share insights, challenges, and aspirations with fellow participants in a relaxed and inspiring setting.

Share best practices, ideas and find solutions to some of your everyday challenges.

Inspirational Keynote

Gain inspiration from our distinguished keynote speakers who will share their journey to success and provide insights on navigating the ever-evolving insurance broking landscape.

Strategy Sessions

Dive into interactive strategy sessions where learners will work on real-world business challenges. Collaborate with peers to develop innovative solutions and gain practical takeaways for immediate implementation.

04: PROGRAMME DETAILS

Duration

Apprenticeship Pathway : 14 months total duration

Non Apprenticeship Pathway : 11 months total duration

Qualification

Apprenticeship Pathway

- Associate Membership of Institute of Sales Professionals
- Level 4 Diploma in Executive Sales

Non Apprenticeship Pathway

- Wiser Academy's own certification : Certified Executive Sales Professional

Resources

Learners will have access to…

- Study materials, reference materials and skill specific podcast
- Networking opportunities
- LinkedIn sales navigator training

Wiser Academy
TRAINING THE INSURANCE INDUSTRY
Ofsted Outstanding Provider

Real-World Skills for Immediate Business Impact

05: A UNIQUE APPROACH TO TRAINING

In contrast to many other courses where the benefits of training take time to materialise, our program is designed with learning activities that seamlessly merge into the daily workflow.

Here, learners not only acquire new skills but also gain immediate opportunities throughout their learning journey to directly apply these skills in their work.

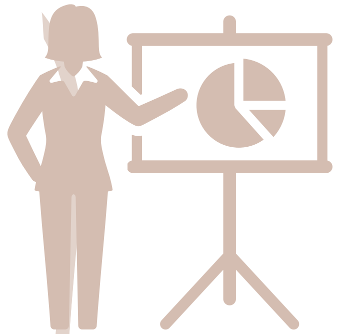
Work-Based New Business Development Project

Learners will undertake a practical, work-based project aimed at enhancing the business's new business development efforts. Through this project, they will thoroughly research and present innovative strategies for implementing cutting-edge sales planning and preparation methodologies. Additionally, learners will address current customer and market challenges, offering tailored solutions. This project will also explore innovative techniques for account management and new business development within the organisation.

05: A UNIQUE APPROACH TO TRAINING

Sales Pitch & Presentation

As a pivotal element of the course, we empower account executives to sharpen their sales skills by providing them with the opportunity to deliver a sales pitch before a panel of industry experts. In this dynamic scenario, learners will be evaluated based on their application of the acquired skills, ensuring a practical and real-world assessment of their abilities.



New business development shadow and coaching

The program trainer will accompany the Account Executive to a live new business meeting with a client, providing valuable coaching and performance-enhancing insights for maximum effectiveness.

06: WHO IS ELIGIBLE TO ATTEND

- Aspiring and current insurance account executives must enrol.
- Account handlers who are in the succession phase and ready to advance to executive roles.
- Any other insurance professionals responsible for driving sales / business growth are invited to join.

Other details

- Participants should be able to commit to the programme and all its learning activities.
- Attendance to the two day residential learning event is highly recommended.
- This programme can be delivered as an apprenticeship programme or as a commercial programme.

TALK TO US…

TO DEVELOP YOUR PEOPLE

&

HELP GROW YOUR BUSINESS

SCAN TO REGISTER

OR

CLICK HERE

INSURANCE

ACCOUNT EXECUTIVE

ACADEMY

Ofsted Outstanding Provider

Wiser Academy
TRAINING THE INSURANCE INDUSTRY

Tel : 01264 317517
email : enquiry@wiseracademy.co.uk
www.wiseracademy.co.uk