



PERSONAL DEVELOPMENT SCOPE

Duties of Insurance Agents

- Insurance sales agents typically do the following:
 - Call potential clients to expand their customer base
 - Do individual financial need analysis
 - Explain the features of various policies
 - Analyze clients' current insurance policies and suggest additions or changes
 - Customize insurance programs to suit individual clients
 - Handle policy renewals
 - Maintain electronic and paper records
 - Help policyholders settle claims

Personal Development - Scope

- Insurance sales agents have to get certified and take refresher courses to maintain their eligibility to sell insurance
- To achieve professional growth and ensure that the insurance agents are equipped to handle changing requirements and ever increasing bouquet of life insurance products; agents have to keep undergoing personal development
- Some areas of personal development which require special focus are as follows:
 - Product Knowledge
 - Customer Oriented Business targets
 - Time Management
 - Long-term relationship
 - Motivation
 - Communication Skills