

## Description for the participants

### Title of the seminar

## Basics of private composite insurance and claims management

<b>Target group</b>	<ul style="list-style-type: none"><li>• Independent insurance brokers</li><li>• Employees of insurance brokers who are used in customer or claims processing</li><li>• Apprentices and students with professional goals of independent insurance brokers</li></ul>
<b>Goals of the seminar</b>	<ul style="list-style-type: none"><li>• Competence for the condition analysis of private composite insurance</li><li>• Advisory competence for private composite insurance</li><li>• Expertise for claim processing by brokers</li></ul>
<b>Content</b>	<ul style="list-style-type: none"><li>• Basics of condition analysis</li><li>• Modern, in-depth and practical expertise in standard lines:<ul style="list-style-type: none"><li>○ Personal liability insurance</li><li>○ Liability insurance for civil servants</li><li>○ Pet owner liability insurance</li><li>○ Legal expenses insurance</li><li>○ Home contents insurance</li><li>○ Property insurance</li><li>○ Car insurance</li><li>○ Accident insurance</li><li>○ Disability insurance</li></ul></li><li>• Modern and practical basic knowledge of standard lines:<ul style="list-style-type: none"><li>○ Home contents insurance for high-quality household contents</li><li>○ Construction output insurance</li><li>○ Glass insurance</li><li>○ Special insurance for personal belongings of private customers</li><li>○ Special liability insurance for private customers</li></ul></li><li>• Practical knowledge of claims management by brokers</li></ul>
<b>Trainer</b>	Björn Olbrich, TBO Versicherungsmakler GmbH
<b>Methods</b>	Presence seminar <ul style="list-style-type: none"><li>○ Presentations supported by PowerPoint</li><li>○ Exercises in individual and group work on insurance conditions</li><li>○ Conversations and discussions with participants in the group</li></ul>
<b>Duration</b>	2 attendance days á 9 hours including breaks
<b>Organizational information</b>	Own laptop, writing material and calculator necessary
<b>Educational time</b>	900 minutes (corresponds to 15 hours)

## Schedule for the coaches

### Presence Seminar Day 1

Time	Content	Goals	Competences	Methods/media	UE	BZ
09:00 - 09:15	Opening, greeting, expiry, list of participants				0,3	0
09:15 - 10:15	Cross-sectoral characteristics	Getting to know the legal basis of private composite insurance	Superficially understand and interpret insurance conditions	Lecture, presentation	1,3	60
10:15 - 11:30	Property insurance	Understand and deepen the structure and tariff characteristics of property insurance	Analyze and advise on property tariffs	Lecture, presentation, exercise in individual work	1,6	75
11:30 - 11:45	Break					
11:45 - 12:30	Construction output insurance	Getting to know needs and important tariff features of construction output insurance	Expert advice on construction output insurance	Lecture, presentation	0,9	45
12:30 - 13:30	Home contents insurance	Understand and deepen the structure and tariff characteristics of home contents insurance	Analyze and advise on home contents insurance tariffs	Lecture, presentation	1,3	60
13:30 - 14:00	Lunch break					
14:00 - 14:30	Glass insurance	Getting to know needs and important tariff features of the glass insurance	Be able to convey glass insurance competently, recognize need	Lecture, presentation, exercise in group work	0,6	30
14:30 - 15:00	Special insurance	Demand and important tariff features of special insurance for personal belongings	Recognize the need for special insurance and provide expert advice	Lecture, presentation	0,6	30
15:15 - 15:30	Break					
15:30 - 16:45	Car insurance	Structure and important tariff features of car insurance, more detailed technical information	Expert advice on car insurance, be able to argue through in-depth knowledge against low-cost providers and comparison portals	Lecture, presentation, exercise in individual work	1,6	75
16:45 - 18:00	Accident insurance	Getting to know structure, needs and important tariff characteristics of accident insurance	Analyze and advise on accident insurance tariffs	Lecture, presentation, exercise in individual work	1,6	75
<b>Total</b>						<b>450</b>

Presence Seminar Day 2						
Time	Content	Goals	Competences	Methods/media	UE	BZ
09:00 - 10:15	Disability insurance	Getting to know structure, needs and important tariff characteristics of disability insurance	Know disability insurance, demarcation to life insurance	Lecture, presentation	1,6	75
10:15 - 11:15	Personal liability insurance	Getting to know structure, needs and important tariff characteristics of personal liability insurance	Personal liability tariffs can be analyzed and advised	Lecture, presentation, exercise in individual work	1,3	60
11:15 - 11:30	Break					
11:30 - 12:15	Liability insurance for civil servants	Getting to know structure, needs and important tariff characteristics of liability insurance for civil servants	Knowing the special features of the civil service, identifying needs and being able to advise on liability	Lecture, presentation	0,9	45
12:15 - 13:00	Pet owner liability insurance	Getting to know structure, needs and important tariff characteristics of pet owner liability insurance	Analyzing and advising pet owner liability tariffs	Lecture, presentation	0,9	45
13:00 - 13:30	Lunch break					
13:30 - 14:15	Special liability insurance for private customers	Getting to know structure, needs and important tariff characteristics of special liability insurance for private customers	Recognize when there is a need for special liability insurance, and provide competent advice for products	Lecture, presentation	0,9	45
14:15 - 16:00	Legal expenses insurance	Getting to know structure, needs and important tariff characteristics of legal expenses insurance	Analyze and advise on legal expenses insurance tariffs	Lecture, presentation	2,2	105
16:00 - 16:15	Break					
16:15 - 17:30	Claims management	Get to know the basics of claims handling, reasons and motivation for claims management by brokers	Do damage recording and processing on your own	Lecture, presentation, group discussion	1,6	75
17:30 - 18:00	Evaluation, discharge				0,6	0
<b>Total</b>						<b>450</b>
<b>Total presence</b>						<b>900</b>

## Requirement profile for trainers

### Title of the seminar

## Basics of private composite insurance and claims management

<b>Preamble</b>	<p>We expect a lot from ourselves and want to offer our customers optimal advice and product selection. But we also want to make our industry as a whole better. Better advice, better processes and better employees should help to provide the best possible results for all sides.</p> <p>For these reasons, we offer high-quality further education, the aim of which is not the mere awarding of continuing education credits, but the professional improvement of the participants. For this, coaches are needed, which themselves have profound knowledge.</p>
<b>Professional requirements</b>	<p>In general, we do not require rigid training and complete CVs. It is important that the trainer is able to competently convey the respective topic and also to be able to adequately respond to deeper and critical questions. The following requirements are desirable and suitable to meet the conditions mentioned:</p> <ul style="list-style-type: none"><li>• Several years of experience in the training of professional participants</li><li>• Study, vocational training or similar training in the finance and insurance industry</li><li>• Special knowledge in the respective teaching topic</li><li>• Several years of experience in insurance sales</li><li>• Safe use of Office programs such as Excel and Powerpoint</li><li>• Abilities in the analysis of insurance conditions</li></ul>
<b>Personal requirements</b>	<p>The selection of our trainers is independent of age, gender, origin, religion or sexual identity. In addition to the technical requirements, however, we require skills in dealing with the participants. These include:</p> <ul style="list-style-type: none"><li>• Excellent German and / or English spoken and written, depending on the language of instruction</li><li>• Rhetorical skills</li><li>• Enthusiasm</li><li>• Safe appearance, also in dealing with criticism</li><li>• Resilience</li><li>• Empathy</li><li>• Well-groomed appearance</li><li>• Sympathetic appearance</li></ul>