# 2015 e-Learning Catalog

## Want the Best Self-Directed Learning Experience in the Industry?

LOMA®

# Industry and Technical Knowledge Packaged to Fit Your Needs

**Our e-Learning Library features a vast array of online courses on various topics relating to insurance and financial services. LOMA also offers new short (less than one hour!) courses on life insurance and annuities products and operations that meet the needs of those new to the industry.**

**So whether you need training in financial services products, company operations, communication skills, or a host of other subjects, LOMA offers ready-to-use content that will help you boost your productivity, performance, and success within your organization.**

## Course Collections

These series of four to six short online courses focus on specific products and operational topics. Available Collections include:

- Know Your Business: Life Insurance Course Collection
- Know Your Business: Annuities Course Collection
- Exceeding Customer Expectations: Customer Service Course Collection
- Sales Support Collection (for both Field and Home Office)
- Spanish On-Boarding Collection
- Spanish Customer Service Collection

### Flexible and Convenient

Learn at your own pace with 24/7 on-demand access to our courses. No matter where you are, if you have Internet access, you can log in and learn!

### Interactive

Reinforce your understanding of the content through a variety of activities and demonstrations. Measure your learning quickly and effectively through online quizzes and tests that provide instant feedback to keep you on track.

### Soft Skills

Finally, complement your industry and technical knowledge with innovative soft skills courses that help build stronger business acumen and enhance your professionalism. Whether you want to improve your communication, leadership, or project management skills, we have the courses that help you propel your career to the next level.

## Available Courses

**For course descriptions and current prices, browse our catalog at www.loma.org**

### ANNUITIES

- Annuities for Today's Investors
- Annuities: How They Work
- Annuities: Overview of Taxation
- Annuities: Why People Buy Them
- Annuity Basics and Participants
- Annuity Concepts
- Annuity Products
- Annuity Regulation
- Asset Allocation
- How Insurance Companies Make Money with Annuities
- Know Your Business: Annuities Course Collection
- LOMA 281 – Meeting Customer Needs with Insurance and Annuities
- Needs Selling
- Variable Contracts

### Business Analysis

- Analyzing Financial Statements for Non-Financial Professionals
- Business Planning Essentials: Performing Key Analyses
- Business Planning Essentials: Preparing a Business Plan
- Business Planning Essentials: Preparing for Implementation
- Effective Critical Analysis of Business Reports
- Planning and Preparing an Operating Budget
- Principles of Accounting and Finance for Non-Financial Professionals
- Recession: How it Affects Business
- Risk Management: Assessing Risk
- Risk Management: Dealing with Risk
- Thinking Like a CFO: Making Financial Decisions
- Thinking Like a CFO: Managing Risk
- Thinking Like a CFO: Preparing and Presenting a Business Case
- Using Audits to Help Prevent Business Fraud

*Visit www.loma.org or e-mail education@loma.org*

LOMA

# Available Courses

For course descriptions and current prices, browse our catalog at www.loma.org

## Business Insurance

- Business Income Coverages
- Claims Evaluation and Settlement
- Estate Planning Concepts
- Group Insurance
- Health Concepts
- Insurance Ethics and Consumer Protection
- Insurance Fraud Awareness
- Liability Insurance Practices
- Workers Compensation Coverage

## Communication

- Business Writing: How to Write Clearly and Concisely
- Business Writing: Know Your Readers and Your Purpose
- Careful Communication
- Communicating Across Cultures
- Communicating Organizational Change
- Communicating Properly During Layoffs
- Communicating with Professionalism and Etiquette
- Communication Skills & Project Management
- Considering Key Features of a Policy and Procedure Manual
- Culture and Its Effect on Communication
- Delivering a Difficult Message with Diplomacy and Tact
- Effective Listening
- Essential Skills for Professional Telephone Calls
- Giving Appropriate Feedback
- Giving Constructive Criticism
- Improving Communication in Cross-Cultural Relationships
- Interpersonal Communication: Communicating with Confidence
- Interpersonal Communication: Targeting Your Message
- Listening Essentials: Improving Your Listening Skills
- Negotiation Essentials: Avoiding Pitfalls in Negotiations
- Negotiation Essentials: Communicating
- Negotiation Essentials: Persuading
- Negotiation Essentials: Planning for Negotiation
- Negotiation Essentials: What Is Negotiation?
- Receiving Feedback and Criticism
- Strategies for Communicating with Tact and Diplomacy
- Techniques for Communicating Effectively with Senior Executives
- The Impact of Situation and Style When Communicating with Diplomacy and Tact
- Using E-mail and Instant Messaging Effectively

## Company Operations

- Claim Administration for Life Insurance
- Distributing Insurance Through Agents
- How Insurance Companies Make Money with Annuities
- How Insurance Companies Make Money with Life Insurance
- Increasing Competitiveness Through Collaboration
- Individual Life Insurance Underwriting
- Interacting Effectively with Agents
- Intro to Underwriting
- LOMA 281 – Meeting Customer Needs with Insurance and Annuities
- LOMA 291 – Improving the Bottom Line: Insurance Company Operations
- Operations Management and the Organization
- Reinsurance Basics
- Reinsurance Overview

## Customer Service

- ACS 101 – Customer Service for Insurance Professionals
- Customer-Driven Process Improvement: Identifying Improvement Ideas and Solutions
- Customer-Driven Process Improvement: Implementing and Maintaining Improvements
- Essential Skills for Professional Telephone Calls
- Exceptional Customer Service
- Interacting Effectively with Agents
- Interpersonal Communication: Communicating with Confidence
- Interpersonal Communication: Listening Essentials
- Know your Business: The Customer Service Course Collection
- Processing Customer Service Transactions for Life Insurance
- Using E-mail and Instant Messaging Effectively
- Working with Upset Customers

## Finance & Accounting

- Analyzing Financial Statements for Non-Financial Professionals
- Basic Accounting Principles and Framework
- Essentials of Budgeting for Non-Financial Professionals
- How Insurance Companies Make Money with Life Insurance
- How Insurance Companies Make Money with Life Insurance and Annuities
- Increasing Cash Flow in Times of Need
- Overview of Insurance Company Financial Management
- Overview of Life Insurance Accounting
- Planning and Preparing an Operating Budget
- Principles of Accounting and Finance for Non-Financial Professionals
- The Accounting Equation and Financial Statements
- The Balance Sheet
- The Income Statement

## Financial Planning

- 401(k) Plans
- Asset Allocation
- Basic Investment Concepts
- Estate Planning Concepts
- Financial Services Overview
- How Insurance Companies Make Money with Annuities
- Know Your Business: Annuities Course Collection
- Planning for a Secure Retirement
- Retirement Income Strategies
- Retirement Savings and Investments
- The Retirement Marketplace

## Human Resources

- Aligning Recruitment to Job Requirements
- Attracting and Retaining Talent
- Coping with Aggressive Behavior in the Workplace
- Creating a Compelling New Job Description
- Creating a High-Retention Organizational Culture
- Creating and Maintaining A Positive Work Environment
- Disciplines of Organizational Learning: Personal Mastery
- Essentials of Interviewing and Hiring: Behavioral Interview Techniques
- Essentials of Interviewing and Hiring: Conducting an Effective Interview
- Essentials of Interviewing and Hiring: Preparing to Interview
- Essentials of Interviewing and Hiring: Selecting the Right Candidate
- Evaluating and Sustaining Organizational Learning
- Family and Medical Leave Act
- HR as Business Partner: From Cost Center to Strategic Partner
- HR as Business Partner: Linking HR Functions with Organizational Goals
- Maintaining an Engaging Organization
- Managing Conflict
- Managing Workplace Stress
- Organizational Behavior: Dynamics of a Positive Organizational Culture
- Organizational Structure and Employee Behavior
- Personal Productivity Improvement: Managing Tasks and Maximizing Productivity
- Recruiting Talent
- Retaining Your Talent Pool
- Succession Planning and Management Programs
- Understanding Workplace Diversity
- Workplace Conflict: Recognizing and Responding to Conflict
- Workplace Conflict: Strategies for Resolving Conflicts

## Available Courses

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### Insurance Fraud

- Claim Investigation
- Coding, Billing, and Fraud
- Fraud in Life and Disability Insurance
- Health Care Fraud
- How to Avoid Healthcare False Claims
- Insurance Fraud Awareness
- Introduction to Insurance Fraud (for Adjusters)
- Introduction to Insurance Fraud (for Agents)
- Pretext and Privacy
- The Neighborhood Investigation
- The Use of Surveillance in an Insurance Investigation

### Insurance On-Boarding

- 15-Minute Insurance Industry Overview
- Distributing Insurance Through Agents
- Know Your Business: The Life Insurance Course Collection
- Life of an Insurance Policy
- LOMA 281 – Meeting Customer Needs with Insurance and Annuities
- LOMA 291 – Improving the Bottom Line: Insurance Company Operations
- Strategies for Successful Employee On-boarding: An Introduction
- Strategies for Successful Employee On-boarding: Assessing Program Success
- The Insurance Sales Process

### Legal, Compliance & Ethics

- Anti-Money Laundering Best Practices for the Life Insurance Industry
- Attorney-Client Privilege
- Avoiding FCPA Violations
- Careful Communication
- Confidentiality under HIPAA: Patient Rights
- Confidentiality under HIPAA: Using Information
- Developing a Code of Ethical Conduct
- Diversity at Work
- Ethical Decision-Making in the Workplace
- Ethical Self-Promotion
- Ethics, Integrity, and Trust
- Global Money Laundering Prevention in the Securities Industry
- HIPAA Requirements, Coverage, and Enforcement
- How to Avoid Healthcare False Claims
- Intellectual Property Overview
- Introduction to Workplace Ethics
- Marketing and Ethics
- Preventing Workplace Harassment
- Sarbanes-Oxley: Overview
- Security of Electronic Health Information Under HIPAA
- The Ethics Enigma
- Understanding the Foreign Corrupt Practices Act
- Your Responsibilities as a Supervisor
- Your Responsibilities as a Supervisor (Institutional)

### Life & Health Insurance

- 15-Minute Insurance Industry Overview
- Agency Support Functions
- Business Income Coverages
- Claim Administration for Life Insurance
- Estate Planning Concepts
- Ethical Conduct in the Insurance Industry
- Financial Services Overview
- Health Concepts
- How Group Health Insurance Works
- How Group Insurance Works
- How Group Life Insurance Works
- How Individual Disability Income Insurance Works
- How Insurance Companies Make Money with Life Insurance
- How Insurance Companies Pay Life Claims
- Individual Life Insurance Policy Provisions and Supplemental Benefits
- Individual Life Insurance Underwriting
- Interacting Effectively with Agents
- Interpreting Medical Records
- Intro to Underwriting
- Introduction to Long-Term Care Insurance
- Introduction to Risk and Insurance
- Life Insurance Basics
- Life Insurance Policy Comparisons and Underwriting
- Life Insurance Products
- Life of an Insurance Policy
- LOMA 281– Meeting Customer Needs with Insurance and Annuities
- Medical Tests and Signs
- Medicare and Medigap Insurance
- Needs Selling
- Overview of Disability Income Insurance
- Policyowner Rights for Individual Life Insurance
- Reinsurance Basics
- Reinsurance Overview
- Sales Training for Insurance Producers
- The Insurance Sales Process

### Management & Leadership

- Acting Decisively
- Adopting the Appropriate Management Style
- Attracting and Retaining Talent
- Business Execution: Crafting a Business Strategy That Executes
- Business Execution: Linking Strategy to People and Operations
- Business Execution: Monitoring and Evaluating Initiatives
- Business Execution: Understanding the Fundamentals
- Delegating Appropriate Tasks
- Developing and Deploying Strategic Plans
- Developing Employees Through Delegation
- Developing the Capacity to Think Strategically
- Developing the Next Generation
- Essential Mentoring Techniques: Building and Maintaining Mentoring Relationships
- Essential Mentoring Techniques: Designing and Initiating Mentoring Programs
- Essential Mentoring Techniques: Mentoring Fundamentals
- Facilitating Difficult Situations
- Facilitating Meetings and Work Groups
- Fostering a Business Execution Culture
- Is Your Company Prepared for a Crisis?
- Key Strategies for Managing Cross-Functional Teams
- Knowing When to Take Leadership Risks
- Leadership Essentials: Building Your Influence as a Leader
- Leadership Essentials: Creating Your Own Leadership Development Plan
- Leadership Essentials: Leading Business Execution
- Leadership Essentials: Leading Innovation
- Managing Attitudes During Difficult Times
- Managing Change: Building Positive Support for Change
- Managing Change: Dealing with Resistance to Change
- Managing Change: Sustaining Organizational Change
- Managing Effective Business Meetings
- Managing High Performers
- Managing Meetings for Productivity and Effectiveness
- Managing Resources During Difficult Times
- Managing Technical Professionals
- Managing Workforce Generations: Working with a 21st Century Generation Mix
- Management Essentials: Confronting Difficult Employee Behavior

# Available Courses

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## Management & Leadership *(continued)*

- Management Essentials: Delegating
- Management Essentials: Managing a Diverse Team
- Overcoming Challenges When Managing Experts
- Performance Appraisal Essentials: Conducting Traditional Appraisals
- Preparing for Business Crises
- Perseverance and Flexibility in Times of Crisis
- Problem Solving: Determining and Building Your Strengths
- Professionalism, Business Etiquette, and Personal Accountability
- Recognizing Natural Leaders
- Recovering From Business Crises
- Transitioning from Technical Professional to Management
- The Art of Effective Coaching
- The Voice of Leadership: Effective Leadership Communication Strategies
- Using Conflict to an Organization's Advantage

## Project Management

- Communication Skills and Project Management
- Mediating Project Team Conflict
- Project Management Fundamentals
- Project Management Skills for Non-Project Managers
- Using Strategic Thinking Skills

## Property/Casualty Insurance

- Business Income Coverage
- Claim Evaluation and Settlement
- Commercial General Liability Coverage
- Homeowners 2000 Coverage
- Legal Concepts and Doctrines
- Personal Auto Coverage
- Personal Inland Marine and Watercraft Coverages
- Personal Lines Endorsement
- Property/Casualty Concepts
- Property/Casualty Principles
- Umbrella Liability Coverage
- Underwriting Basics
- Workers Compensation Coverage

## Retirement Planning

- 401(k) Plans
- Asset Allocation
- Basic Investment Concepts
- Introduction to Long-Term Care Insurance
- Medicare and Medigap Insurance
- Overview of Retirement Plans
- Planning for a Secure Retirement
- Retirement Income Strategies
- Retirement Savings and Investments
- The Retirement Marketplace

## Sales Training

- Distributing Insurance Through Agents
- Individual Life Insurance Policy Provisions and Supplemental Benefits
- Introduction to Risk and Insurance
- Needs Selling
- Replacements of Life Policies and Annuities
- Sales Training for Insurance Producers
- The Life of an Insurance Policy
- The Insurance Sales Process
- Using Online Strategies to Accelerate Sales Performance

## Securities & Suitability

- Asset Allocation
- Ethical Conduct in the Insurance Industry
- Ethics, Integrity and Trust
- Insurance Ethics and Consumer Protection
- Needs Selling
- Variable Annuity Sales Practices

*For more information,*

Contact your company's LOMA Educational Representative. If you are an independent student, contact LOMA's Office of the Registrar.

LOMA®

www.loma.org
1-800-ASK-LOMA