

Transform Your Company's Success With the *Certificate in Customer Experience Essentials*



Build strong customer experience skills and industry knowledge across your organization



Foundational Education for Everyone

This industry-specific curriculum is ideal for all professionals working in the insurance industry — including carriers and outsource organizations — better equipping them to develop professionally and provide a quality customer experience:

- **New and recent employees** with fewer than six months in the insurance/annuity business
- Employees **moving to an insurance/annuity function from another area** within the company
- Any individual looking to **fill gaps in basic knowledge** about insurance principles, products, and company operations

LOMA 281

Meeting Customer Needs With Insurance and Annuities

This course provides instruction on insurance principles, products, and contractual rights. It further highlights individual and group life insurance and annuity features, as well as the ways insurance companies meet customer needs.

10 – 12
hours

Duration of **10 – 12 hours**
with up to six months per
course to complete



Self-proctored,
modularized content

LOMA 291

Improving the Bottom Line: Insurance Company Operations

This course offers an in-depth view of efficient and profitable company management, providing new employees a valuable grasp of successful operational and administrative functions. In addition, course content explores insurance companies' major functions — guided by board and executives — to satisfy stakeholders.

10 – 12
hours

Duration of **10 – 12 hours**
with up to six months per
course to complete



Self-proctored,
modularized content

CX 50

Impact Cx: The Quest

This gamified course fosters a unified customer-first mindset among employees, transforming them into customer advocates with empathy and sound judgment. It features five missions of increasing difficulty, highlighting empathy, marketing, journey mapping, customer experience advocacy, and a customer-centric culture. Students take on different roles and make decisions that affect the customer experience, reinforcing how customer expectations are evolving.

1 – 5
hours

Duration of **1 – 5 hours**



Online, scenario based, gamified
course meant to be experienced
on a mobile device



Digital badge and e-certificate once all three courses are completed



For More Information: contact us at intl@loma.org



Certificate in Customer Experience Essentials



LOMA 281

Meeting Customer
Needs With Insurance
and Annuities

Module I: Risk and Insurance

- Lesson 1: Risky Business?
- Lesson 2: Organization and Regulation of Insurance Companies
- Lesson 3: Life Insurance Policies as Contracts
- Lesson 4: The Value Exchange in the Insurance Transaction

Module II: Individual Insurance Products

- Lesson 1: Term Life Insurance
- Lesson 2: Cash Value Life Insurance
- Lesson 3: Annuities
- Lesson 4: Health Insurance

Module III: Benefits, Provisions, and Ownership Rights

- Lesson 1: Supplemental Benefits
- Lesson 2: Life Insurance Policy Provisions
- Lesson 3: Life Insurance Policy Ownership Rights

Module IV: Group Products

- Lesson 1: Group Insurance
- Lesson 2: Group Life Insurance
- Lesson 3: Group Retirement Plans



LOMA 291

Improving the Bottom
Line: Insurance
Company Operations

Module I: Company Overview

- Lesson 1: Many Stakeholders, Many Demands
- Lesson 2: The Great Organizational Pyramid: Unlock Its Mysteries
- Lesson 3: Risk, Return, and Risk Management

Module II: Product Administration

- Lesson 1: Distribution: Getting the Product to the Customer
- Lesson 2: New Business and Underwriting: Turning Prospects Into Insureds
- Lesson 3: Customer Service — Serving Customers Effectively
- Lesson 4: Claims Administration: Paying Out Death Benefits Promptly and Accurately

Module III: Marketing, Product Development, and Compliance

- Lesson 1: Marketing
- Lesson 2: Product Development
- Lesson 3: Legal and Compliance Functions: Doing the Correct Things Correctly

Module IV: Financial Management

- Lesson 1: Financial Functions in an Insurance Company
- Lesson 2: Goals for Financial Management



CX 50

Impact Cx:
The Quest

Join in the quest to impact CX through five customer-focused missions highlighting:

- Empathy
- Listening to the Voice of the Customer (VOC)
- Journey Mapping
- Customer Experience Advocacy
- Customer-Centric Culture

Assume various roles — and situations — in which your decisions will affect the customer experience and relationship with the company. Each mission reinforces how customer expectations are changing and incorporates technology-enabled interactions. Each decision point aligns with [LIMRA's Customer Experience Benchmarking Program's](#) dimensions of customer experience. These include ease of doing business, satisfies needs, peace of mind, provides value, and meets expectations.