

# CONTACT CENTER - LIFE: Standard Learning Path

## GENERAL KNOWLEDGE

15–Minute Industry Overview

Exceptional Customer Service

Ethical Conduct in the Insurance Industry

Life of an Insurance Policy

Life Insurance Products

Managing Time and Stress

## TARGETED DEVELOPMENT

### Foundational

Meeting Customer Needs with Insurance and Annuities (LOMA 281)

Improving the Bottom Line: Insurance Company Operations (LOMA 291)

Customer Service for Insurance Professionals (ACS 101)

### Proficiency

The Policy Lifecycle: Insurance Administration (LOMA 302)

Insurance Marketing: (LOMA 321)

### Expertise

Operational Excellence in Financial Services (LOMA 335)

Risk Management & Product Design for Insurance Companies (LOMA 371)

Certificate in Regulatory Compliance Essentials

## LEADERSHIP DEVELOPMENT

Resource Magazine

Contact Center Committee

Fellow Life Management Institute (FLMI)

Webinar: The Future of Contact Centers

Customer Experience Conference

Fellow Secure Retirement Institute (FSRI)

News & Research: Customer Experience

InfoCenter Brief: Insurance Call Center Standards & Metrics

Customer Service & Operations Benchmarking Surveys