

*FINN 3000-002
Insurance Sales & Negotiations
Spring, 2017*

Instructor: Thomas S. Marshall

Office: 350D Friday Building

Office Hours: TR 5:00-6:00 PM and by Appointment

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Class Meets: TR, 3:30 PM – 4:45 PM, Friday 107

Special Information

The Belk College of Business strives to create an inclusive academic climate in which the dignity of all individuals is respected and maintained. Therefore, we celebrate diversity that includes, but is not limited to ability/disability, age, culture, ethnicity, gender, language, race, religion, sexual orientation, and socio-economic status.

Regular class attendance and promptness are expected. Three or more unexcused absences or frequent tardiness are considered adverse attendance. Classroom performance (clicker assessments, class discussion and attendance) represents 10% of the final grade.

All students are welcome to visit with me during office hours or by appointment.

All students are required to be familiar with the following two codes defined in the 2016-2017 Undergraduate Catalog <http://catalog.uncc.edu/index.php> and to conduct themselves in accordance with the standards set forth:

- A. The UNC Charlotte Code of Student Academic Integrity
- B. The UNC Charlotte Code of Student Responsibility

Course Description

This course is an overview of the skills and concepts of personal branding, networking, insurance sales and negotiations.

Course Objectives

1. Understand the unique characteristics of the insurance market
2. Develop basic skills of personal branding and networking
3. Understand and apply key skills and concepts in insurance sales
4. Understand and apply key skills and concepts in successful negotiations
5. Discuss career opportunities in risk management and insurance sales

Textbook Resources

A **Clicker (Turning Technologies)** is required. The Clicker can be purchased from the Bookstore.

Following texts available at Bookstore or Amazon:

The Challenger Sale, Dixon and Adamson
The Wedge, Randy Schwantz, National Underwriter Company
Getting to YES, Negotiating Agreement Without Giving In, Fisher & Ury

Examinations and Grades

The grading scale is as follows:

90 and above = A; 80 – 89 = B; 70 – 79 = C; 60 – 69 = D; less than 60 = F

1. There will be two examinations and a project. Each exam is 40% of the final grade. In general, no make-up exams will be given. If a student misses an exam because of an excused absence, the missed exam weight will be added to the final exam weight, and the final exam will be comprehensive (including material from the missed exam). If a student misses an exam because of an unexcused absence, a zero (0) grade will be assigned for that exam.
2. The course includes an individual project, which requires researching and making an oral presentation regarding a company attending the Financial Services Career Fair and developing your personal branding statement. The Company analysis, branding statement, Career Fair attendance and networking represent 10% of the final grade.
3. 10% of the final grade is based on classroom participation including attendance, class discussion and interactive assessments (Clicker exercises).

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Tentative Assignments

Date	Topic	Chapter
January	10 Introduction to Insurance Sales	
	12 Selling Fundamentals	
	17 Personal Branding & Elevator Speech	
	19 LinkedIn	
	24 Career Fair - Networking	
	26 Ethics	
	31 Communication Principles	
February	2 Young Producers Study: Achieving Success	<i>Young Producer Study</i>
	7 Speaker – David Rogers, Robbins Associates	
	9 Adaptive Selling to Build Relationships	
	14 Prospecting	<i>The Challenger Sale</i>
	16 Challenger Sales	<i>The Challenger Sale</i>
	21 Challenger Sales	<i>The Challenger Sale</i>
	23 Student Presentations	
	27 Financial Services Career Fair	Cone Center 341-Lucas Room, 5:00-7:30
	28 Challenger Sales	<i>The Challenger Sale</i>
March	2 Winning Sales - The Wedge	<i>The Wedge</i>
	14 Winning Sales - The Wedge	<i>The Wedge</i>
	16 Mid Term Exam	
	21 Speaker	
	23 Handling Objections	
	28 No Class	
	30 Obtaining Commitment	
April	4 Building Partnering Relationships	
	6 Negotiations – Getting to Yes	<i>Getting to Yes</i>
	11 No Class	
	13 Negotiations - Getting to Yes	
	18 Negotiations – Case Discussion	
	20 Salary Negotiations	
	25 Negotiations Review	
	27 Sales Strategic Planning	
May	2 Sales Strategic Planning	
May	11 Final Exam, 2:00 PM	