Sample Internship Schedule

	Week One	Person(s) Responsible	Completion Date
Day 1	Morning Itinerary - Meet and greet staff - Key for access to building - Agency mission statement - Agency model - Agency business plan - Letters in system - Lunch Afternoon Itinerary IT Administrator - Review job description - Set up system passwords and access codes - Learn equipment (telephone, copier, computer) - Goals/targets		
Day 2	Quality Control Manager - Review job description - Multiple location management of staff - Computer morning utilities - Download/upload - Set up system passwords and access codes per company and website - Mail - Policy changes/new policies/cancel - Goals/targets - Letters in system		
Day 3	Investments/Life/Health & Compliance - Review job description - Multiply location management of staff - Security/compliance - Quoting - Application process - Mail - Policy changes/new policies/cancel - Delivery - Goals/targets - Letters in system		

	Week One	Person(s) Responsible	Completion Date
Day 4	Computer Tech/Website - Outside source how this relates to IT position - Review job description - Security - Updates - Access/availability - Trouble shooting - Goals/targets - Letters in system		
Day 5	VOIP-New Telephone System - Outside source how this relates to IT position - Create job description - Installation - Use - Security - Updates - Access/availability - Trouble shooting - Letters in system		

	Week Two	Person(s) Responsible	Completion Date

Day 6	Commercial Producers
	  - Review job description
	  - Commercial lines
	  - DAQ - Diagnostic Questionnaire
	  - Gathering data
	  - Agency standards
	  - Quoting
	  - Presentation
	  - Renewals
	  - Goals/targets
	  - Letters in system		

Day 7	Personal Account Managers
	  - Review job description
	  - Personal lines
	  - CUCN - Customer Connection
	    (Find the Pain)
	  - Gathering data
	  - Agency standards
	  - Quotes
	  - Coverage deficiencies
	  - Renewals
	  - Follow-up
	  - Goals/targets
	  - Letters in system		

Day 8	Underwriting Requests
	Personal/Commercial Lines
	  - Review job description
	  - RCE - Replacement Cost Estimator
	  - Agency standards
	  - Safety
	  - Measuring
	  - Photos
	  - Forms or supplements
	  - Follow-up
	  - Attachments
	  - Goals/targets
	  - Letters in system		

Day 9	Bail Bonds
	  - Review job description
	  - Process
	  - Letters in system		

Week Two		Person(s) Responsible	Completion Date
Day 10	Commercial Risk Assessment - Review job description - Visit Sites/Inspections - Process - Customer usage - Goals/targets - Letters in system		

	Week Three	Person(s) Responsible	Completion Date
Day 11	Personal Producer - Review job description - Personal lines - Appointments/reviews - Phone selling - Mass market mailings - Process - Goals/targets - Letters in system		
Day 12	Managers - Review job description - All lines - Goals reports by department - Bonus target - Trainings - Staffing issues - Human resources - Letters in system		
Day 13	Personal Lines Processing - Review job description - Personal lines - Workflow - Input - Quoting - Goal/bonus target - Applications/premiums - Issue - Scanning - E&O compliance - Premium payments - Goals/targets - Letters in system		

	Week Three	Person(s) Responsible	Completion Date
Day 14	Commercial Lines Processing - Review job description - Commercial lines - Workflow - Input - Quoting - Goal/bonus target - Applications/premiums - Issue - Scanning - E&O compliance - Premium payments - Goals/targets - Letters in system		
Day 15	Accounting - Review job description - All lines/all expenses - Payroll - Workflow - Scanning - E&O compliance - Premium payments/agency bill/direct bill/collections - Goals/targets - Letters in system		

	Week Four	Person(s) Responsible	Completion Date
Day 16	Special Projects - Review job description - All lines - Agency standards - Measuring - Goals/targets - Follow-up - Letters in system		
Day 17	Commercial Risk Assessment - Review job description - Sites inspections - Process - Customer usage - Goals/targets - Letters in system		
Day 18	Quoting - Review job description - Personal lines - Quoting - Workflow - Deliver quotes via e-mail - Attachments - Evaluation - Letters in system		
Day 19	Marketing - Review job description - All lines - Brochures - Documents/Excel/attachments - Evaluation - Goals/targets - Letters in system		
Day 20	Owners Meeting - Review job description - Old/new/current business - Reports by owners - marketing, finance, producers/agency upgrades, company liaison, operational manager - Goals/targets - Letters in system		

Week Five		Person(s) Responsible	Completio n Date
Day 21-25	Intern's choice of favorite department or job in the agency		

Sample Project Ideas

Company Projects

1. Research and collect statistical information to help the company decide where to appoint new agencies to write business.

2. Do a SWOT analysis on the company. Research information pertinent to the company, and to their competitors. Develop a marketing plan for the company to gain name recognition.

3. Research statistical data for licensing new states and/or current states. Gain an understanding of the strategies companies use to determine growth areas.

4. Analyze an advertisement, or advertisement campaign, and determine audience, reach, and form of advertising. Make suggestions on how to reach out to potential markets.

5. Analyze company promotional materials for consistency of brand.

6. Evaluate a current commission program and make recommendations on its current usage and benefit.

7. Review a current employee enhancement program and make suggestions on what is beneficial and what needs work.

8. State market expansion.

9. Coverage comparison.

10. Social media analysis.

Agency Projects

1. Develop a disaster plan for the agency. If the business was destroyed by a natural disaster, how much work would it take to get it back up and running?

2. Purchasing insurance online. What is available online and what do people look for when buying insurance? Research different companies in the market as well as the factors people look for when buying insurance.

3. Obtain leads, get quotes and then contact potential customers to gain an understanding of attracting new business to an agency.

4. Develop a customer survey to be sent to all clients.

5. Implement a scanner and help the agency take steps to become paperless.

6. Create a job description manual for all positions in the agency.

7. Find and research new carriers to meet the agency's needs.

8. Update employee profiles for agency marketing brochures.

9. Create and/or update website for the agency.

10. Procedures/employee handbook creation.

11. Agency management system training.

12. Market research (buyer habits).

13. Research and interview potential carriers.