

The logo for 'the PLT program' is centered in the upper part of the main content area. It features the word 'the' in a small, lowercase, serif font, followed by 'PLT' in large, bold, uppercase, sans-serif letters, and 'program' in a smaller, lowercase, serif font. The text is white and set against a dark green rectangular background. The background of this section is a solid dark grey.

PLT (Personal Lines Transformation) is a 4 day, onsite coaching system developed to standardize workflow process and drive to improve the structure, profitability and overall success of insurance brokers Personal Lines Divisions.

The strategy behind the PLT Program is to create an operating platform for scalable growth. Through the standardization of TSR/CSR workflows, the program facilitates the development of the personal lines department by establishing distinct roles among TSR's, CSR's and Producers. It is through these roles that TSR's/CSR's are enabled to maximize performance, generating opportunities for increased client retention, accountability and a reduced exposure to E&O claims.

The PLT training program provides brokerages with;

- Simple, clearly defined efficient TSR/CSR workflows around Endorsements, Renewals, New Business, Claims and Cancellations.
- Simple, clearly defined efficient CSR workflows around Expiry Review, Segmentation, Remarketing, Rewrites and Retention.
- Revenue generating opportunities.
- Time management systems to eliminate backlog and reduce E&O exposure.
- Clearly organized, efficient office systems.

The PLT Program is accredited by;

- RIBO - 12 Personal; 5 Management
- ChAD - 20 UFC Administration

*Applications pending throughout Canada.*