



Producer: _____

Start Date: _____

Completion Date: _____

How to Use this Learning Plan

- Print this Learning Plan and meet with your supervisor to determine the “What You Need to Know” and “Learning Activities” you should complete for your role in the Agency. Add the phone and email information for your Commercial Lines Contact in the list below.
- As you complete the assigned activities check them off so that you can track what you have completed.
- The last page of the guide allows you to track the quotes you have completed and if you sold them.
- The Learning Plan is not intended to be completed all at once, but rather take topics as you have time.
- Check in with your supervisor or your Progressive Commercial Lines contact if you have questions on any of activities listed or quotes that you completed.

Key Support Contacts	Phone	Email
Agency Services	877-776-2436 Option 2	customerservice@progressiveagent.com
Claims Service	800-274-4499	
Technical Support	800-695-4050	
Smart Haul Supplemental Application	877-776-2436	SmartHaul@email.progressive.com
Fleet Quoting	888-515-3296	fleet@commercial.progressive.com
Livery Program	877-776-2436	livery@progressive.com
Commercial Lines Contact		

Commercial Learning Toolbox

All Commercial Lines learning and reference materials can be found on: www.foragentsonly.com

1. Log into ForAgentsOnly.com
2. Click on **Support**
3. Select **Knowledge on Demand**
4. Type “**CL Training**” in the **Search** field and hit enter
5. Complete each section as outlined in the Learning Plan

PROGRESSIVE

Commercial Lines Training

Learning Plan Link to go here

Getting Started

Products and Coverages

Quote and Issue

Truck Underwriting

Service

Tools and Resources

Search [Knowledge on Demand](#) to learn more about Commercial Lines

Milestones	Date Completed
First Commercial Quote	
First Commercial app sold	

Commercial Lines Learning Plan

	What You Need to Know	Learning Activities and Resources
Getting Started	<ul style="list-style-type: none"> Know who to contact for support Understand Commercial Auto appetite and opportunity Understand the sellable difference of Progressive Commercial Understand the Progressive Commercial Claims advantage Recognize the difference between Personal Auto and Commercial Lines Auto 	<p>Click on the Getting Started icon and complete the listed tasks:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Watch the Commercial Lines Getting Started video <input type="checkbox"/> Review the Commercial Auto Reference Card or the Commercial Auto Reference Card (Spanish) <input type="checkbox"/> Review the We're Your Best Choice for Commercial Auto pdf <input type="checkbox"/> Review the Comparing Commercial and Personal Auto pdf <input type="checkbox"/> Review the Claims Handling That Gets Your Truckers Back on the Road Fast <input type="checkbox"/> Review the Commercial Auto Product Guide for your state(s) <input type="checkbox"/> Watch the Discover your Commercial Auto Potential Live Video Chat
Products and Coverages	<ul style="list-style-type: none"> Know the Commercial Lines Programs: Light Commercial, Heavy Truck and Tow Understand the Livery Program in your state Recognize difference between TNC and Livery coverage Know when and how to quote Fleet Understand additional coverage options and endorsements Understand USDOT requirements and regulations 	<p>Click on the Products and Coverages icon and complete the listed tasks:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Watch the CL Products & Coverages video <input type="checkbox"/> Review the Business Auto and Contractors Programs Sell Sheet <input type="checkbox"/> Review the Heavy Truck Programs pdf <input type="checkbox"/> Watch the USDOT Rated CL Auto Product video <input type="checkbox"/> Review the Tow Program <input type="checkbox"/> Review the Livery Reference Card
Quote and Issue	<ul style="list-style-type: none"> Explain sellable differences between Progressive and other companies to customers and the Progressive Value Proposition Understand USDOT implications to accurate, sellable quote Apply Smart Haul Understand truck filings Complete an accurate Commercial Auto quote Print out a Certificates of Insurance Understand Fleet quoting process and guidelines 	<p>Click on the Quote and Issue icon and complete the listed tasks:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Review the We're Your Best Choice for Commercial Auto <input type="checkbox"/> Watch the Get Started Quoting Commercial Auto video <input type="checkbox"/> Watch the Get Started Quoting Heavy Truck video <input type="checkbox"/> Review the Commercial Auto Quoting Reference Card <input type="checkbox"/> Review the Quoting Commercial USDOT Tip Sheet <input type="checkbox"/> Review the Commercial Auto Business List <input type="checkbox"/> Review the Smart Haul Program Overview <input type="checkbox"/> Review the Smart Haul Program Frequently Asked Questions <input type="checkbox"/> Review the Smart Haul Application for Existing Policies <input type="checkbox"/> Watch the Trouble-free Truck Filings Course <input type="checkbox"/> Review the Commercial Fleet Overview <input type="checkbox"/> Complete a practice quote and review with your manager
Truck Underwriting	<ul style="list-style-type: none"> Recognize ineligible risks Understand our business class and vehicle risk underwriting approach Understand our Fleet Program appetite 	<p>Click on the Truck Underwriting icon and complete the listed tasks:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Watch the Truck Appetite and Underwriting Expectations video <input type="checkbox"/> Watch the Getting It Right At Point Of Sale video <input type="checkbox"/> Watch the How To Use SAFER For Truck Underwriting pdf
Service	<ul style="list-style-type: none"> Search for a policy Provide a Certificate of Insurance via the mobile app Look up Smart Alerts Locate the Policy Summary page How to know if a policy has an audit request Explain claims repair options 	<p>Click on the Service icon and complete the listed tasks:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Watch the Commercial Lines Policy Servicing video <input type="checkbox"/> Review the Policy Servicing Commercial pdf <input type="checkbox"/> Review the Heavy Truck Claims
Tools and Resources	<ul style="list-style-type: none"> Understand the Commercial Means Business program Complete a Smart Haul, Fleet, Livery Supplemental Applications 	<p>Click on the Tools and Resources icon and complete the listed tasks:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Sign up for Commercial Means Business <input type="checkbox"/> Review your state Commercial Auto Product Guide <input type="checkbox"/> Contact your Commercial Rep to discuss sales-related issues, including commercial auto program education and state-specific market issues <input type="checkbox"/> Contact Agency Services for policy questions, licensing and compliance <input type="checkbox"/> Review the Smart Haul, Fleet, and Livery supplemental applications for your states
Questions to Ask		

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