



Customer Service for the Insurance Professional



Customer service skills are often the only way your brokerage can differentiate itself.

Add Value to your Brokerage!!

- What contributions do I make that add the most value to my brokerage?
- When does my role change from CSR to salesperson?
- How can I recommend solutions that meet my clients' needs without sounding pushy?
- How can I reduce complaints and handle the most difficult ones?
- How can I best represent my brokerage in the community?
- What are the best time management strategies that will help me meet the challenges of my work schedule?
- How do my professional standards add the most value to the brokerage?
- How can I act ethically when I perceive an unethical problem exists?

STAND OUT FROM THE COMPETITION

Become an effective Communicator!!

- ✓ How do I deliver excellent customer service?
- ✓ What are my clients' expectations?
- ✓ How do I exceed them?
- ✓ What is my role in the brokerage's business plan?
- ✓ What are the techniques used for measuring my client's satisfaction?
- ✓ How will **you be rewarded** for your efforts?

Customer Service for the Insurance Professional consists of four modules. The focus of the self-study course is quality customer service. Working through four interactive modules, you will learn how to apply a quality customer service approach to every aspect of your position.

Module 1: The Role of The Broker

- Quality Service and its Benefits
- Client Expectations
- Client Service Roles
- Communication Skills.

Module 2: Adding Value to your Brokerage

- Selling Skills
- Client Negotiation
- Public Relations
- Time Management

Module 3: Brokerage Operations

- Automation
- Office Procedures
- E&O
- Money Handling

Module 4: Industry Issues

- The Broker and the Law
- Inadequate Coverage
- Role of the Government
- Career Development

(See over for Registration Form)



Customer Service for the Insurance Professional

Application for Registration



Make copies as needed - **DO NOT FAX** - registrations processed as received by mail only.

NAME: _____

MENTOR: (For Homestudy option only) _____

BROKERAGE: _____

ADDRESS: _____

CITY: _____ **POSTAL CODE:** _____

PHONE: _____ **FAX:** _____

Homestudy Course Information

Cec's per module:
6 for student, 4 for mentor

You must have a designated mentor before completing this form.

Random checks may be made with mentors for verification purposes.

Cost per module:
\$120.00

I wish to register for:

- Module 1**
- Module 2**
- Module 3**
- Module 4**

Enclosed please find my cheque in the amount of \$_____ payable to I.B.A.M.

PLEASE NOTE: If you are not notified before the seminar begins, assume that your registration is confirmed and that the seminar will begin as scheduled. Keep a copy of this registration as a reminder.

All applications are processed on a first-come, first-served basis as payment is received.

All seminars are subject to minimum attendance requirements.

SEND YOUR REGISTRATION FORM WITH YOUR CHEQUE TO:

**I.B.A.M. 205-530 Kenaston Blvd,
Winnipeg, MB R3N 1Z4**
Ph: (204) 488-1857 (800) 204-5649

Presenter: Kathi MacMillan,
Education Director for the IIBAA.
Kathi brings 20 plus years history of teaching customer service courses. Her presentation style is interactive and her use of humor guarantees that learning will be fun and memorable.

Classroom Course Information

Cec's per module:
8 MB
10 Personal ON

Scheduled to be held at the IBAM Training Centre.

Registration fees include all course materials and lunch.

Cost per workshop:
\$280.00

Dates - TBA

(See over for Course Information)