



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?

I found this course to be excellent as it pertained to the daily routine of "office life". Many courses that are offered are not geared towards every single office, but this course had "something for everyone" AS all brokerages are now striving for excellence in the Customer Service aspect, this course is a **MUST** for everyone. Attending the course allowed everyone to talk openly about how each office handles certain situations (good and bad) and allows you to leave with not only the course outline of what you should do , but how other brokerages deal with it.

-Sherrie Krueger, CAIB
K.B. Insurance Services Ltd.

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 CSR

- ✓
 - 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

**STAND OUT
FROM THE
COMPETITION**

(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:
Members:
\$125.00

Non-members:
Add 50% surcharge
\$187.50

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

Dates
TBA

Classroom Course Information

Cec's per module:
6 MB
6 Personal ON

*Scheduled to be held at
the Centro Caboto Centre.*

*Registration fees include
all course materials and
lunch.*

Cost per module:
\$125.00
(Text: \$67 per module)

(See over for Course Information)