

Customer Service for the  
Insurance Professional

# CSIP

EDUCATION FOR BROKERS BY BROKERS

Your solution for wandering clients...

IBAO  
School of  
Insurance

*“I liked the interactive portions of the program and the excellent speakers and ideas brought forth.”*

**Bethany Lackey**  
Team Leader  
Haber Blain Insurance Brokers

*“Even as an experienced CSR Manager, both myself and my staff really benefited from this course. Even the basic areas, such as telephone skills and communication, were excellent reminders of bad habits picked up over the years. Quite often I will pull out my workbook and refer to checklists or info on E&O matters.”*

**Lynn Gauthier, CAIB**  
Personal Lines Manager  
Mooney Insurance Agency Ltd.

*“The CSIP program provides great learning to take back to the office and apply. As someone new to the industry, I now feel much more confident in my role.”*

**Lori Bigelow**  
Service Team Leader  
Advocate Insurance Group



Detailed information on  
all programs and registration can  
be found on the IBAO website at  
**[www.ibao.org](http://www.ibao.org)**

## The IBAO School of Insurance

1 Eglinton Avenue East, Suite 700, Toronto, ON M4P 3A1  
Tel: (416) 488-7422 Fax: (416) 488-7526  
Toll Free: 1-800-268-8845



## Program Description

Clients base their insurance decisions not just on price and coverage, but on the quality of their interactions with the service provider. As a CSR, you are a key player in the general insurance industry. More often than not, it is you who have the majority of direct contact with clients. This places you in an ideal position to retain clients, to build the client base through referrals, and to cross-sell additional products and services, according to the needs of your clients. In so doing, you are significantly adding value to the bottom line of your brokerage.

The Customer Service for the Insurance Professional Program is a four-part certificate program that deals with the critical service role of the customer service representative. It looks at every aspect of brokerage operations from a customer service perspective and focuses on the exact job functions of those that deal with the clients.

This program will help ensure that your office maintains a consistent, high quality, customer service approach in all market conditions.

## Program Outcomes

- Gain new ideas and approaches to not only meet but exceed your clients expectations
- Develop the skill sets necessary to ensure that you and your office **maintains a consistent, high quality, customer service approach** in all market conditions
- Network and learn from other like minded insurance professionals
- Develop the **confidence to communicate** with your clients in a professional manner
- Learn how to **add value to the brokerage bottom line** through retention, referrals, cross selling and rounding out accounts
- **Earn CSIP Certificate and RIBO hours**

## Study Formats

Recognizing the often overwhelming demands on professionals time, we have created a program that can be taken at your convenience. It is offered in both a seminar and self study format. With both formats there are NO EXAMINATIONS to study for or write. In the seminar format, students earn their certificate by attending four progressive seminars.

In the self study format, students work through the program, at their own pace, with the assistance of a mentor (i.e. manager, owner) in their brokerage office.

The mentor reviews the students' exercises for each module and forwards verification of completion to IBAO for certificate purposes.

With self study, each student must have a "mentor" designated at the time of registration, someone in your workplace to provide you with guidance. This can be as formal or informal a relationship as you wish. Some choose to have weekly study sessions, while other mentors make themselves available should questions arise.

At the end of each module, there is a summary and review of the text, including multiple choice and short answer questions. Your mentor reviews your answers to these questions and verifies your successful completion of the module.

\*A Certificate of Recognition will be issued upon completion of the full program.

## Program Outline

### 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
- Industry Organization
- Career Development

## Annual Retreat Format

### RECOMMENDED FOR

- CSR's
- Personal Lines Managers

Great reward opportunity for top performing CSR's & showcase opportunity for Personal Lines Managers

### DATE

November 8-10, 2012

**LOCATION** Deerhurst Resort, Huntsville, Ontario

**FEE** \$1695 per person- IBAO MEMBERS ONLY  
(Includes CSIP program & materials, accomodations, meals and scheduled group activities)

### RIBO ACCREDITATION

16.5 hours (8.25 Personal Skills, 8.25 Management)

### COURSE FACILITATOR

**Beverly Russell**, Ideal Insurance Brokers Inc.

### SALES CONTENT FACILITATOR

**Derek Faulconer**, Campbell Roy & Eldridge Ins. Services Inc.

### E & O CONTENT FACILITATOR

**Paul Green**, The CG&B Group Inc.

## Correspondence Format

### FEE

\$165.00 per module - IBAO MEMBERS ONLY  
\$620 full series - IBAO MEMBERS ONLY  
(Includes course and materials)

### RIBO ACCREDITATION

Module 1: 8 Personal Skills Hours  
Module 2: 8 Management Hours  
Module 3: 8 Personal Skills Hours  
Module 4: 8 Management Hours