



Licensed (level I and/or II) insurance brokers are encouraged to give their career a solid boost by continuing their professional development by acquiring one or more of the nationally recognized professional designations /certificates. These programs are specifically designed, written and delivered by Canadian insurance brokers. A professional designation can increase your advancement and income opportunity.

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## CUSTOMER SERVICE FOR THE INSURANCE PROFESSIONAL (CSIP) CORRESPONDENCE

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Do you feel prepared to provide top quality customer service to your clients?

Clients base their insurance decisions on the quality of their interactions with the service provider, in addition to the price and coverage. As the front line of communications, you 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, as well as, enhancing the public perception of your brokerage.

Customer Service for the Insurance Professional is a four-part program dealing 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 clients. This program will help ensure that your office maintains a consistent, high quality, customer service approach in all market conditions. It is an excellent resource for any new person to the insurance brokerage field and a great refresher for seasoned employees.

There are no examinations to write. Students work through the program at their own pace with the assistance of a mentor (i.e. manager, owner) within their brokerage office. The mentor provides students with guidance in areas where they require assistance, and reviews the student's answers to exercises in each module.

IBAO issues a certificate of completion to the student once it receives verification from the mentor that the student has completed the module.

**NOTE:** The IBAO is pleased to present an in class option for the CSIP program. Classes will be held at the IBAO School of Insurance.

### OVERVIEW

#### **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

#### **RECOMMENDED for:**

Customer Sales - Service Representatives/Producers

#### **COST**

- \$165.00 - per module
- Members only

#### **RIBO ACCREDITATION**

MODULE 1: 8 - Personal Skills Hours

MODULE 2: 8 - Management Hours

MODULE 3: 8 - Personal Skills Hours

MODULE 4: 8 - Management Hours

