



Certified Insurance Service Representatives

The Society of Certified Insurance Service Representatives was founded in 1986 as a companion program to CIC, aimed directly at meeting the educational needs of customer service representatives. However, as the program developed, it became apparent that the intermediate-level curriculum of the CISR Program could and should reach a wider audience. Today, the CISR Program has become a valuable educational resource for all employees of agencies, insurance companies, or insurance-related businesses. The CISR Program focuses on minimizing E&O claims and the understanding and analysis of risks and exposures.

The CISR Program is comprised of five, one-day courses. An optional examination is administered at the conclusion of each course, and those successfully passing all five examinations earn the CISR designation.

Insuring Commercial Casualty Exposures

- Learn the elements of Legal Liability.
- Gain a solid understanding of the Commercial General Liability Policy, including coverages, insureds, exclusions, definitions, and limits of insurance.
- Improve cross-selling skills by learning how to make commercial coverages less difficult.
- Review the Business Auto Policy, including coverages, covered autos, insureds, exclusions, and endorsements.
- Discuss the Workers Compensation and Employers Liability Policy, including how to understand the information page, policy coverage, exclusions and endorsements that your client may need.

Insuring Commercial Property

- Review the major Commercial Property Coverage Forms and Cause of Loss Forms.
- Learn which optional coverages and endorsements can be tailored to your clients' needs.
- Understand Business Income Coverage, its uses, and who needs it.
- Learn how to qualify a risk by using specific questions and checklists.
- Improve your cross-selling ability by being up-to-date on important Commercial Property coverages.

Insuring Personal Auto Exposures

- Analyze the coverage provided by the Personal Auto Policy and its major endorsements.
- Learn how the Personal Auto Policy responds to owned, borrowed, or rented autos.
- Examine the Personal Umbrella Policy and how it benefits your insured.
- Discover who is an insured.
- Explore avenues for avoiding E&O exposures.
- Get the most up-to-date, state-specific information available, and much more!

Attention Utica Policy Holders:

CISR Agency Operations and Dynamics of Service are approved programs for your E&O premium discount. For details call Heather at 1-800-261-7429.

Insuring Personal Residential Property

- Analyze the coverages provided by the Homeowners Policies and endorsements.
- Examine who is an insured.
- Identify where the insured's property is covered.
- Explore common exposures excluded by unendorsed policies.
- Study the applications of coverages to specific risks.
- Discover who is served best with a Dwelling Policy.
- Distinguish key differences between Homeowners and Dwelling Policies.

Agency Operations

- Delivers proven techniques for updating, streamlining, and professionalizing your agency.
- Determine the critical issues facing insurance agencies and how to head off common customer problems.
- Understand the legal and ethical obligations of insurance personnel.
- Identify the tools necessary to develop professional relationships with companies and clients.
- Review agency work flow concepts and automation.
- Learn how to minimize errors and omissions exposures.
- Gain a thorough understanding of agency systems, from new business to cancellations.

William T. Hold Seminars — No Test

Dues paid CISR, CIC & CRM designation holders only

- Satisfies the annual CE requirement of the Society of CISR.
- Specific topics and in-depth discussions.
- Networking opportunities in a relaxed atmosphere.

Dynamics of Service — No Test

Open to all. CISRs may use as an update if a member of CISR

- Explore the role of service from the sale, to customer satisfaction.
- Target the people issues that surface daily.
- Analyze the sales and service functions.
- Learn to handle difficult people using listening and communication skills.