



# Agency Operations

November 18, 2025 - Online

## CLASS OVERVIEW & TOPICS

CISR Agency Operations can transform you into an indispensable team player in any insurance agency or give you confidence to move into another position. As you work with colleagues and customers, you'll discover an enhanced self-assurance and a greater understanding of the dynamics within insurance organizations. Also, understanding how agencies function is essential training for both insurance agency and company personnel.

### Agenda

- 7:45 - 8:00 a.m. **Join webinar**
- 8:00 - 9:00 a.m. **Ethical & legal requirements**  
Ethical behavior benefits and common issues.
- 9:00 - 10:00 a.m. **Managing the insurance agency**  
Healthy culture, service factors, and risk management basics.
- 10:00 - 11:00 a.m. **The insurance industry and marketplace**  
Markets, financial stability, and rating.
- 11:00 am - 12:00 p.m. **Risk management & agency processes**  
Basics of the risk management process.
- 12:00 - 12:45 p.m. **Lunch**
- 12:45 - 1:15 p.m. **Managing coverage information exchange**  
The risks and management of exchanging coverage information to customers.
- 1:15 - 2:15 p.m. **Managing the agency workflows & procedures**  
The basics of new and renewal processes for agency procedures.
- 2:15 - 3:15 p.m. **Account management**  
Tools to assess financial health.
- 3:15 - 3:45 p.m. **Errors & omissions**  
Negligence, common causes of claims, and action steps.
- 3:45 - 4:15 p.m. **Q&A review**

### Location & Instructor

**Nov. 18, 2025**

**GoToWebinar**  
*(Online)*

**Instructor:**

*Lorie Estelle*  
*CISR, CPIA, AU*

### Examination

The exam window for CISR webinar courses will begin immediately after the course concludes through the following Friday at 11:59 p.m. CT. To access the exam, log in to your PROfile at <https://riskeducation.org/SignIn> and visit the Learning Portal. You will need a disinterested third party to proctor the exam. For more information on selecting a proctor and taking the online exam, visit <https://www.riskeducation.org/proctor-monitor-rules/>. If you need assistance, the exam help inbox ([examhelp@riskeducation.org](mailto:examhelp@riskeducation.org)) is monitored during normal business hours of 8 a.m. - 5 p.m. CT.

