



Agency Operations

Oct. 17, 2024 - 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

Oct. 17, 2024

GoToWebinar
(Online)

Instructor:
Chuck Hembree
CIC, CRM

Examination

The exam window for CISR webinar courses will begin immediately after the course concludes through the following Thursday at 11:59 p.m. CT. You will need a disinterested third party to proctor the exam. For more information on selecting a proctor and taking the online exam, visit scic.com/proctor-monitor-rules. If you need assistance, the exam help inbox (examhelp@scic.com) is monitored during normal business hours 8 a.m. - 5p.m. CT.

