

# BECOME AN INDISPENSABLE COMMERCIAL LINES ACCOUNT MANAGER

A custom learning path to navigate your way toward a thriving career.



## THE COMMERCIAL LINES ACCOUNT MANAGER

An agency's frontline staff has many different job titles, including Customer Service Representative, Customer Service Agent, Account Representative, Account Manager, and Account Executive. The frontline staff is responsible for servicing and maintaining existing accounts to include quoting new lines of insurance, handling all policy inquiries and changes, and ensuring that all information on an account is correct and up-to-date. They prepare and complete applications, as well as follow up on needed information. Strong technical coverage expertise is often expected for senior frontline roles, and customer service skills are essential. They are often the primary contact person for the insured. The frontline staff builds and maintains relationships, and interfaces with carriers and clients.



**THE COMMERCIAL LINES ACCOUNT MANAGER LEARNING PATH** is designed to guide you towards unbridled career growth—wether you are new to your career or an already seasoned professional. Walk through our professional development offerings, choose the level appropriate for you, and get closer to achieving a thriving career.

### INTRO LEVEL

PARTICIPANTS WHO COMPLETE INTRO COURSES HAVE A **70% HIGHER** FUTURE EXAM PASS RATIO

#### INTRO TO PROPERTY & CASUALTY INSURANCE

Foundational insurance concepts, principles, and liability basics with a focus on property and casualty.



#### INTRO TO COMMERCIAL PROPERTY

Concepts for insuring businesses and personal property including causes of loss and endorsements.

#### INTRO TO COMMERCIAL CASUALTY

Analysis of the Business Auto Policy and Commercial General Liability Policy to increase understanding of basics for insuring business liability exposures.



#### INTRO TO COMMERCIAL MISC. EXPOSURES & COVERAGES

Important commercial coverage information for Inland and Ocean Marine, Equipment Breakdown, and Commercial Crime.

### INTERMEDIATE LEVEL

#### COMMERCIAL CASUALTY I

Focus on the Essentials of Legal Liability, Commercial General Liability, and Additional Insureds.



#### COMMERCIAL CASUALTY II

Focus on Business Auto Exposures and Coverages, Workers Compensation, Employer Liability Insurance Policy, Commercial Umbrella and Excess Liability Policies.

#### AGENCY OPERATIONS

Insurance organization dynamics and functions for both agency and company personnel.



#### INSURING COMMERCIAL PROPERTY

Fundamentals of Commercial Property Insurance, Building and Personal Property Coverage Form, Causes of Loss Form, Basics of Time Element Insurance, and Basics of Commercial Inland Marine Insurance.



#### ELEMENTS OF RISK MANAGEMENT

Five crucial steps of the Risk Management process: Identification, Analysis, Control, Financing, and Administration.



### ADVANCED LEVEL

89% OF PARTICIPANTS WHO COMPLETE CIC & CPRM COURSES SAID THAT THE COURSE WILL IMPROVE THEIR JOB PERFORMANCE

#### COMMERCIAL CASUALTY

Become familiar with current, practical policy knowledge and learn how to apply the Limits of insurance and recommend appropriate endorsements.



#### COMMERCIAL PROPERTY

Learn the latest trends in commercial property insurance and innovative ways to maximize coverages with up-to-the-minute forms.

#### COMMERCIAL MULTILINE

Learn how to help commercial clients navigate critical issues, such as cyberthreats and crime from both property and casualty perspectives.



#### AGENCY MANAGEMENT

Learn the fundamentals of strategic planning within and agency and learn what actions are needed to achieve growth.

#### COMPANY OPERATIONS

Learn how you can apply advanced executive strategies to improve business functions and promote company success.



#### PRINCIPLES OF RISK MANAGEMENT

Risk management essentials that give you the tools to properly identify exposures.

#### CONTROL OF RISK

Risk control techniques—safety, alternative dispute resolution, employment practices liability, and crisis management.



#### FINANCING OF RISK

Compare risk financing options that can solve the various needs of an organization based on its risk-taking appetite and ability.



#### ANALYSIS OF RISK

How to use risk data to analyze the frequency and severity of losses, the potential for future losses, and cost-benefits of control solutions.



#### PRACTICE OF RISK MANAGEMENT

This course consolidates what you have learned in other CRM courses. For this reason, it is suggested that you take this course last. This course also helps you tackle the daily managerial and organizational requirements of risk managers and consultants.



4 INTRO SERIES CERTIFICATES



CISR DESIGNATION DIPLOMA & PIN



CIC DESIGNATION DIPLOMA & PIN



CRM DESIGNATION DIPLOMA & PIN

AVERAGE DESIGNATED ACCOUNT MANAGER COMPENSATION

**\$65,615\***

TOTAL SERVICING VOLUME

**\$1,066,560\***

### COMPREHENSIVE LEARNING

**Dynamics of Service**  
INDUSTRY SPECIFIC SERVICE TRAINING COURSES

**PROFocus series**  
HIGH-LEVEL INSURANCE AND RISK EDUCATION TOPICS

**WILLIAM T. HOLD SEMINARS**  
40+ ESSENTIAL, SPECIALTY, AND ADVANCED TOPICS

\*All evaluation numbers are based on total evaluations received from participants during 1/1/2019 - 10/4/2019  
\*All Compensation And Production numbers are based on 2019 Edition of the Pulse of Customer Service