New Hire Professional Lines

TOTAL CSR

Qualified Professional Insurance Specialist (QPIS)

New Hire Training (21-32 Hours)

The design of this designation program is to take someone new to the industry and empower them to start running a desk immediately. It is practical in nature and focuses on daily job duties rather than extensive coverage knowledge and utilize a variety of engage and interactive learning methodologies.

Course Outlines

Agency 101

1. Getting Your Feet Wet
2. Types of Agencies
3. Roles in the Agency
4. Internal Relationships
5. External Relationships
6. Communication Skills
7. Effective Organization and Daily Habits
8. Dealing with Interruptions and Taking Breaks
9. Adding Value – What Separates You from the Pack?
10. The Lifecycle of the Client
11. Documents 7 Forms in the Renewal Process
12. Your Personal Brand

Cyber Liability

1. **Cyber Liability Insurance Introduction**
2. **Cyber Liability Overview**
   - Cyber Liability Insurance Overview
   - Coverage
   - Covered Causes of Loss
   - Policy Limits
   - Policy Conditions
   - Common Exclusions
   - Quiz
   - The CSR Support Cycle
3. **Obtain Required Submission Information**
   - Request Information
   - Currently Valued Loss Run Reports
   - Quiz
4. **Complete Cyber Liability Insurance Applications**
   - Cyber Liability Application Overview
   - Cyber Liability Scenarios
5. **Send The Submission**
6. **Reviewing Quotes**
   - Reviewing Quotes
   - Quiz

7. **Create & Presenting the Proposal**
8. **Bind Coverage With The Insurance Company**
9. **Policy Checking**
10. **Support the Insured**
11. **Proposals, Binding Coverage, And Policy Checking Quiz**
12. **Final Exam**

Pollution Liability Insurance

1. **Pollution Liability Insurance Introduction**
2. **Pollution Liability Insurance Overview**

- Pollution Liability Insurance Overview
- Coverage
- Who is an insured?
- Policy Conditions
- Common Exclusions
- Common Policy Endorsements
- Quiz
- The CSR Support Cycle

3. **Obtain Required Information**

- Request Information
- Currently Valued Loss Run Reports
- Quiz

4. **Complete Submission Forms**

- Premises Pollution Liability Insurance Application Overview
- Contractors Pollution Liability Insurance Application Overview
- Pollution Scenarios

5. **Send The Submission**
6. **Complete Online Carrier Quoting Process**
7. **Reviewing Quotes**

- Reviewing Quotes
- Quiz

8. **Create & Presenting the Proposal**
9. **Bind Coverage With The Insurance Company**
10. **Policy Checking**
11. **Proposals, Binding Coverage, And Support Quiz**
12. **Supporting the Insured**
13. **Final Exam**

Errors & Omissions/Professional Liability Insurance

1. **Errors & Omissions/Professional Liability Insurance Overview**

- Introduction
- E&O/Professional Liability Insurance Overview
- Coverage
- Policy Limits
- Defense and Settlement Provisions
- Coverage Enhancements
- Policy Conditions
- Common Policy Endorsements
- Common Exclusions
- Quiz
- The CSR Support Cycle

2. **Obtain Required Submission Information**
   - Request Information
   - Currently Valued Loss Run Reports
   - Quiz
3. **Complete Submission Forms**
   - E&O Application Overview - Insurance
   - E&O Application Overview - Construction
   - Errors & Omissions Scenarios
4. **Send The Submission**
5. **Complete Online Carrier Quoting Process**
6. **Reviewing Quotes**
   - Reviewing Quotes
   - Quiz
7. **Create & Presenting the Proposal**
8. **Bind Coverage With The Insurance Company**
9. **Policy Checking**
10. **Proposals, Binding Coverage, And Support Quiz**
11. **Supporting the Insured**
12. **Final Exam**

Directors & Officers Insurance

1. **Directors And Officers Insurance Overview**
   - Directors and Oficers Insurance Introduction
   - Directors and Oficers Insurance Overview
   - Coverage
   - Policy Limits
   - Policy Conditions
   - Common Policy Endorsements
   - Common Exclusions
   - Quiz
   - The CSR Support Cycle
2. **Obtain Required Submission Information**
   - Request Information
   - Currently Valued Loss Run Reports
   - Quiz
3. **Complete Submission Forms**
   - D&O Insurance Application Overview
   - Directors & Officers Scenarios
4. **Send The Submission**
5. **Reviewing Quotes**
   - Reviewing Quotes
   - Quiz
6. **Create & Presenting the Proposal**
7. **Bind Coverage With The Insurance Company**
8. **Policy Checking**
9. **Supporting the Insured**
10. **Proposals, Binding Coverage, And Support Quiz**
11. **Final Exam**

Employment Practices Liability Insurance (EPLI)

1. **Employment Practices Liability Insurance Introduction**
   - Employment Practices Liability Insurance Overview
   - Coverage
   - Common Policy Endorsements Cost of Claims
   - Quiz
   - The CSR Support Cycle

2 **Obtain Required Submission Information**

- Request Information
- Currently Valued Loss Run Reports
- Quiz

3 **Complete Submission Forms**

- EPLI Application Overview
- EPLI Scenarios

4 **Send The Submission**

6 **Reviewing Quotes**

- Reviewing Quotes
- Quiz

7 **Create & Presenting the Proposal**

8 **Bind Coverage With The Insurance Company**

9 **Policy Checking**

11 **Supporting the Insured**

10 **Proposals, Binding Coverage, And Support Quiz**

12 **Final Exam**