

Nine CISR Modules

Choose five of the nine to obtain the CISR designation or any of the modules to fulfill your CISR update.

Commercial Casualty I – CGL,AI

This course strengthens your ability to have productive, assured interactions with your commercial customers in the area of commercial casualty exposures and coverages. You will improve your understanding of legal liability and what creates liability exposures. The focus of this course is the Commercial General Liability Coverage Form. This course also addresses additional insured exposures and the coverage available to meet these needs.

Topics:

- Essentials of Legal Liability
- CGL Introduction
- Commercial General Liability Coverage Parts
- CGL Other Provisions
- Additional Insureds

Commercial Casualty II – BAP, WC, Excess

This course, like Commercial Casualty I, strengthens your ability to have productive, assured interactions with your commercial customers in the area of commercial casualty exposures and coverages. In this course the focus is the Business Auto Policy, the Workers Compensation Policy and Excess Liability Policies. You will improve your understanding in each of these areas.

Topics:

- Business Auto Exposures and Coverages
- Workers Compensation & Employers Liability Insurance Policy
- Commercial Umbrella and Excess Liability Policies

Insuring Commercial Property

Commercial property insurance is one of your business customers' greatest concerns. You'll improve your cross-selling abilities with up-to-date knowledge of commercial property coverage, and reduce E&O exposures. This course gives you the skills to address these issues with greater ease and confidence.

Topics:

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

Insuring Personal Residential Property

This course gives you the expertise you need to guide your customers through the often complex and confusing process of purchasing homeowners insurance - and help them make decisions that insure their most valuable assets.

Topics:

- Introduction to the Homeowners Policy
- Homeowners Policy Section I
- Homeowners Policy Section II
- Tenants, Unit-Owners, and the Dwelling Policy

Insuring Personal Auto Exposures

After taking this course, you will be able to assist your clients in identifying their exposures and more effectively advise them in the processes of analyzing, obtaining, and modifying their personal automobile policies.

Topics:

- Introduction to the Personal Auto Policy
- Liability Coverages
- Medical Payments Coverage
- Uninsured/Underinsured Motorists Coverage
- Coverage for Damage to Your Auto
- Provisions

Personal Lines – Miscellaneous

*It is recommended that students taking CISR Personal Lines Miscellaneous have already taken CISR Personal Residential, or have a working knowledge of the Homeowners Policy Form.

This course addresses the exposures created by watercraft, recreational vehicles, and business activities often encountered when working with personal lines clients. Prompting your client to identify these exposures is crucial, because the ISO Homeowners and ISO Personal Auto Programs provide only very limited coverage. You will be better able to design the appropriate coverage for these exposures. The course will also provide an analysis of the important coverage offered through personal umbrella or excess liability policies.

Topics:

- Watercraft Exposures & Coverages
- Recreational Vehicles
- Business Activities of Personal Lines Clients
- Personal Umbrella/Excess Liability

Life & Health Essentials

This course will help build a better understanding of what your clients need to know about life and health insurance. Explaining the benefits of having the proper life and health insurance is key to the financial wellbeing of your clients' families and businesses.

Be better prepared to answer questions about analyzing the need for and placement of life insurance. Health insurance includes a diverse assortment of policies, from medical expense coverage to vision care and dental coverage, plus a variety of delivery systems and health plans designed to manage the high cost of care.

Topics:

- Introduction to Life Insurance
- Term Insurance
- Permanent Life Insurance
- Health Insurance Concepts
- Regulation
- Consumer Driven Plans

Elements of Risk Management

Insurance professionals need training in the risk management process for two reasons. First, insurance is an integral part of their client's overall risk management program. Second, services provided by carriers, agencies and brokerages are often significant items in the organization's cost of risk.

In this eight-hour course we will cover each of the five powerful steps in this process, which protects not only the organization's assets, but also its mission and its brand.

Topics:

- The Risk Management Process & Risk Terms
- Risk Identification
- Risk Analysis
- Risk Control
- Risk Finance
- Risk Administration

Agency Operations

This course helps make you an indispensable team player in any insurance agency. As you work with colleagues and customers, you will do so with enhanced self-assurance and a greater understanding of the dynamics within insurance organizations. Also, understanding how agencies operate is essential training for both insurance agency and company personnel.

Topics:

- Legal & Ethical Requirements
- The Insurance Agency
- The Insurance Industry and Marketplace
- Communication
- Agency Workflow
- Account Management
- Errors & Omissions

Dynamics of Service

(Does not qualify towards earning the CISR designation)

In a competitive marketplace, an agency's or company's most important asset is...its people. Give your personnel the tools they need to succeed!

Dynamics of Service is consistently one of our highest-rated programs. Participants repeatedly tell us how this one-day course transformed their lives immediately when back on the job. And how much FUN it was to attend.

Difficult personalities are one of the realities of doing business. Dynamics of Service helps overcome the annoyance you feel during these encounters – by learning behavioral styles and effective ways to communicate. You can learn a process that leads to satisfied and loyal customer relationships – which in turn leads to greater retention rates.

The success of Dynamics of Service is a direct result of an energetic and knowledgeable faculty. These instructors have lived and practiced what they teach; they know what works in the "real world."

When you attend Dynamics of Service, you will:

- Improve your people skills dramatically.
- Tune up your professional competence.
- Acquire a wealth of tools and techniques for dealing with customers effectively.

All these skills serve to make an employee more valuable, more productive, and more satisfied on the job.

William T Hold

(Does not qualify towards earning the CISR designation)

As part of the Founders Series, these innovative one-day courses are special advanced learning and update opportunities for insurance and risk management professionals.

The agenda is created from more than 40 topics, ranging from personal lines to commercial lines to life and health to risk management. You will explore topics that were either briefly covered or not covered at all in the five core CISR courses. For example, selected topics could include garage insurance, certificates of insurance, or rental cars. For specific topic information, consult the seminar agendas on the schedule page.

Hold Seminars provide excellent workbook materials and informal Q&A with the faculty -- experienced insurance industry professionals.

Benefits:

- Satisfies the annual CISR and CSRM update requirements.
- Generous CE credit in most states
- Expert instruction
- State-specific topics and in-depth discussions
- Networking opportunities in a relaxed atmosphere - AND NO TEST!

2018 William T Hold class topics:

- Business Auto Policy & Endorsements
- Personal Lines & Business Exposures