BECOME AN INDISPENSABLE
PERSONAL LINES ACCOUNT MANAGER

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

THE PERSONAL 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.

INTRO LEVEL	INTERMEDIATE LEVEL	ADVANCED LEVEL
4 Courses	5 Courses	9 Courses

THE PERSONAL LINES ACCOUNT MANAGER LEARNING PATH is designed to guide you towards unbridled career growth—whether you are new to your career or an already seasoned professional. Walk though 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 10% HIGHER FUTURE EXAM PASS RATIO

INTRO TO PROPERTY & CASUALTY INSURANCE

intro series

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

INTRO TO PERSONAL AUTO INSURANCE

intro series

Personal Automobile Insurance is a familiar coverage for anyone who owns a car. This course is about how it actually works. After completing this course you will understand the basic provisions of the coverage parts of the Personal Automobile Policy.

INTRO TO PERSONAL RESIDENTIAL PROPERTY

intro series

Personal Residential insurance is one of the most common package policies sold today. After completing this course, you will understand the basic provisions of the coverage parts of the Homeowners Program.

INTRO TO LIFE AND HEALTH INSURANCE

intro series

Sort through life and health insurance decisions. Review the important coverages and financial strategies used across the industry for life and health insurance.

INTERMEDIATE LEVEL

INSURING PERSONAL AUTO EXPOSURES

CISR

The CISR Personal Residential Course helps you develop the expertise to navigate the often complex and confusing process of purchasing homeowners insurance. More importantly, you will be able to provide practical information that will help insured homeowners be prepared for a loss, recover more quickly, and lessen their financial burden in the event of a loss.

INSURING PERSONAL RESIDENTIAL PROPERTY

CISR

The CISR Personal Residential Course helps you develop the expertise to navigate the often complex and confusing process of purchasing homeowners insurance.

OTHER PERSONAL LINES SOLUTIONS

CISR

Learn to address exposures created by business activities, the ownership or use of recreational vehicles and watercraft, and the need for additional coverage through Personal Umbrella Liability and Catastrophe Coverage.

AGENCY OPERATIONS

CISR

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 will develop a balanced self-assurance and a greater understanding of the dynamics within insurance organizations.

LIFE & HEALTH ESSENTIALS

CISR

This course helps build a foundation of knowledge in the area of 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.

EARNED THE CISR DESIGNATION

ADVANCED LEVEL

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

PERSONAL LINES

In the CIC Personal Lines course, you will become familiar with the property and casualty insurance industry, covering topics related to Personal Residential and Personal Auto, including policy coverages, limitations, and exclusions. Through the use of examples of Personal Umbrella or Excess Policies, you will learn how to respond in the event of a loss.

INSURANCE COMPANY OPERATIONS

In the Insurance Company Operations course, you will learn strategic decision-making strategies for the purpose of satisfying regulatory requirements, meeting compliance standards, product development, underwriting, distributing and marketing, processing claims, and other vital company functions.

LIFE AND HEALTH

In the CIC Life and Health course, you will become familiar with the industry's Life and Annuity Policies, Business Life Concepts, Health Insurance, and Employee Benefits. Leave the class with information that you can put to use immediately.

AGENCY MANAGEMENT

In the CIC Agency Management course, you will learn how to apply the management theories, methods, and procedures necessary to operate a successful insurance agency. Leave the class prepared to implement strategies designed to increase agency profitability.

PERSONAL CLIENT RISK MANAGEMENT

CPRM

Learn strategies for managing the complexities of the affluent and high net worth clients and the importance of incorporating risk management when structuring their insurance programs.

EVALUATING AND PROTECTING THE LIFESTYLE

CPRM

Thoroughly analyzing the lifestyle of the affluent and high net worth client by insurance and risk management is the focus of this course. Learn to evaluate the often specialized coverage needs and gather the necessary information used by insurance companies to insure and risk manage these lifestyle exposures.

UNDERSTANDING COVERAGE DIFFERENCES

CPRM

An analysis of primary personal lines policies available for insuring the complex lifestyle of the affluent and high net worth client. You will learn to explain and apply the differences in key coverage areas between standard policies and various policies designed specifically for these clients.

WINNING THE BUSINESS

CPRM

This course will help you to have a conversation with your client both the broker side and the company side of serving these clients. Successful role-play is a part of the course and is a great way to polish your skills and test your knowledge.

UNDERSTANDING COVERAGE DIFFERENCES

CPRM

This course is an analysis of primary personal lines policies available for insuring the complex lifestyle of the affluent and high net worth client. You will learn to explain and apply the differences in key coverage areas between standard policies and various policies designed specifically for these clients.

EARNED THE CPRM DESIGNATION

4 INTRO SERIES CERTIFICATES | CISR DESIGNATION DIPLOMA & PIN | CIC DESIGNATION DIPLOMA & PIN OR CPRM DESIGNATION DIPLOMA & PIN

AVERAGE DESIGNATED ACCOUNT MANAGER COMPENSATION

$54,573*

TOTAL SERVICING VOLUME

$1,013,639*

Dynamics of Serivce
INDUSTRY SPECIFIC SERVICE TRAINING COURSES

PROFocus series
HIGH-LEVEL INSURANCE AND RISK EDUCATION TOPICS

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

*IXI evaluation numbers are based on total evaluations received from participants during 1/1/2011 - 10/14/2019

*IXI Compensation And Production numbers are based on 2019 Edition of the Pulse of Customer Service