



**Insurance**  
INSTITUTE OF EAST AFRICA

# CUSTOMER SERVICE FOR INSURERS



**In-House  
Training**

# Introduction

Every insurance professional who has contact with clients faces the challenge of communicating so clients feel they have received the best service possible. Customer Service for Insurers will help develop the skills to communicate effectively in every customer interaction.

## Suitability

All insurance personnel who work directly with clients can benefit from this course, including:

- Customer service representatives;
- Claims employees;
- Producers;
- Support personnel; and
- Underwriters.

## Course Objectives

After completing this course, participants will be able to do the following:

- Explain what is meant by customer service and identify the “customers” that insurance professionals serve
- Explain why a focus on the customer is essential for the insurance industry in today’s highly competitive environment
- Use verbal communication skills effectively to deliver quality service
- Deliver optimal service on the telephone, from the time the phone rings until the caller hangs up
- Use proper etiquette with other communication tools, including automated phone systems, voice mail, e-mail, and fax
- Manage a customer’s problem or complaint through to a satisfactory conclusion
- Resolve specific types of challenging situations

# What is Covered

## Day One

### Module 1:

#### Who is this Thing Called Customer Service?

#### Learning Objectives

After completing this module, participants will be able to do the following:

- Identify the four basic principles of customer service
- Describe the common elements of customer service
- Provide examples of internal and external customers in the insurance industry environment
- Provide examples of external customers served by various positions in the insurance industry

### Module 2:

#### Staying Alive: Survival for the Fittest

#### Learning Objectives

After completing this module, learners will be able to do the following:

- Identify elements in the current insurance marketplace that make it important to provide quality customer service
- Describe the characteristics of the insurance product that make providing good customer service even more important than it is with other products
- Explain how providing quality customer service can improve the public's perception of the insurance industry and help a company retain customers
- Explain why businesses are moving from a sales-oriented focus to a customer service focus
- Describe the factors that customers have identified as being crucial elements of good customer service

### Module 3:

#### Communication Fundamentals

#### Learning Objectives

After completing this module, participants will be able to do the following:

- Explain the roles of the following in the communication process: message sender, message receiver, encoding, decoding, and shared experiences
- Define noise and provide examples of noise that impact both verbal and written communication
- Describe how a message can be adjusted based on self-feedback and feedback
- Define the different contexts in which communication occurs
- Provide examples of non-verbal and explain how they affect communication
- Explain the difference between a connotative and denotative meaning of a word
- Explain how jargon can negatively impact communication
- Define the following characteristics of vocal quality: pitch, volume, rate, enunciation, and tone

# Day Two

## Module 4:

### Quality Service by Telephone

#### Learning Objectives

After completing this module, participants will be able to do the following:

- Explain why it is vital to begin phone conversations positively to make a good first impression on customers
- Identify the elements of a professional phone greeting
- Describe techniques recommended to provide quality telephone service, such as using customers' names and allowing customers to control how their calls are handled
- Develop rapport with customers and build professional relationships
- Use active listening and critical evaluation to effectively serve customers
- Explain how non-verbal impact telephone conversations

## Module 5:

### Etiquette in the Age of Technology

#### Learning Objectives

After completing this module, learners will be able to do the following:

- Describe the advantages and disadvantages associated with various communications technologies
- Define the role of a gatekeeper
- Discuss the pros and cons of automated telephone systems
- Describe recommended techniques for appropriate telephone and voice mail etiquette
- Identify the components of a voice mail system
- Explain how the following communications technologies are used to serve customers: email, text messages, websites, applications, instant messages, faxes, and phone devices for the hearing or speech impaired

## Module 6:

### Handling Problems and Complaints

#### Learning Objectives

After completing this module, participants will be able to do the following:

- Explain why it is important to “own” a customer’s problem
- Describe techniques that will help you solve a customer’s problem yourself
- Define open, closed, and double questions and describe the advantages and disadvantages of each
- Explain how you can still own a customer’s problem even when you can’t solve it yourself
- Explain how customer complaints and feedback can help your company improve its products and services

# Module 7:

## Quality Techniques for Customer Service

### Learning Objectives

After completing this module, participants will be able to do the following:

- Use specific techniques to respond to challenging customer service scenarios, including the following:
  - Delivering negative information
  - Apologizing to angry customers, even when you are not at fault for the problem
  - Identifying emotions that influence how customers interact with you
  - Assisting customers who are confused, uncertain, angry, or nonstop talkers
- Recover a customer's goodwill by providing quality service
- Effectively summarize customer service transactions to ensure customers are satisfied

### Course Delivery

This course combines formal but highly interactive lectures and discussions with dynamic exercises. Delegates will also be examined at the end of the training to qualify for a Certificate of Participation.

### Course Summary

<b>Location:</b>	To be provided by Client
<b>Duration:</b>	2 Days
<b>Fee:</b>	Ksh 520,000 + VAT Per Group
<b>Dates:</b>	Open



**Contact us to book for the Training**

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