

# E&O LOSS CONTROL / CUSTOMER SERVICE

7.5 CE credits per class

## E&O LOSS CONTROL/CUSTOMER SERVICE

7.5 CE credits each class, Customer Service includes 1 Ethics credit

8 a.m. – 4:30 p.m. each day

\$135 member / \$270 nonmember each class



These one-day classes are designed to provide CSRs with the tools for reaching their full potential. With an emphasis on account service and E&O loss control, these classes will help CSRs deliver the kind of service that keeps customers coming back.

### E&O Loss Control

#### Day 1 / 7.5 CE credits

This course aims to help CSRs avoid errors and omissions problems with information on:

- documentation techniques
- meeting customers' expectations
- binding coverage
- cancellations and nonrenewals
- working in surplus lines markets
- and more

### Lower Your E&O Premium

Agencies insured through IIAT Advantage E&O may be eligible for a 10 percent discount for attending this class. For more information, call the IIAT Insurance Agency at 800.880.7428.

### Customer Service

#### Day 2 / 7.5 CE credits

(includes 1 Ethics credit)

This course increases the CSR's skills in working with customers with a focus on:

- ethics
- professional development
- effective customer communications
- time management
- efficient use of automation
- and more

### The Road to ACSR

The E&O Loss Control / Customer Service course, for many, is the final step in pursuit of the Accredited Customer Service Representative designation. For more information on obtaining the ACSR designation, contact IIAT or visit [iiat.org](http://iiat.org).

Both of these classes are required for CSRs earning their ACSR designation in personal lines, commercial lines or life and health.



**Independent  
Insurance**  
Agents of Texas

IIAT Education

CITY

DATE

LOCATION

PHONE

E&O Loss Control

|                |                  |  |              |
|----------------|------------------|--|--------------|
| AUSTIN         | Aug. 14          | Norris Conference Center<br>2525 W. Anderson Lane                            | 512.451.5011 |
| CORPUS CHRISTI | April 24         | Ortiz International Ctr.<br>402 Harbor Dr.                                   | 361.879.0125 |
| DALLAS         | April 3, Aug. 23 | Addison Conference Center<br>15650 Addison Rd.                               | 972.450.6200 |
| HOUSTON *      | April 19, Aug. 2 | Norris Conference Center – Houston Westchase<br>9990 Richmond Ave., Ste. 102 | 713.780.9300 |
| LUBBOCK        | Aug. 9           | Overton Hotel and Conference Center<br>2322 Mac Davis Lane                   | 806.776.7000 |
| SAN ANTONIO    | April 19         | Norris Conference Center<br>Crossroads Mall,<br>4522 Fredericksburg Rd.      | 210.738.0040 |

CUSTOMER SERVICE

|                |                  |  |              |
|----------------|------------------|--|--------------|
| AUSTIN         | Aug. 15          | Norris Conference Center<br>2525 W. Anderson Lane                            | 512.451.5011 |
| CORPUS CHRISTI | April 25         | Ortiz International Ctr.<br>402 Harbor Dr.                                   | 361.879.0125 |
| DALLAS         | April 4, Aug. 24 | Addison Conference Center<br>15650 Addison Rd.                               | 972.450.6200 |
| HOUSTON *      | April 20, Aug. 3 | Norris Conference Center – Houston Westchase<br>9990 Richmond Ave., Ste. 102 | 713.780.9300 |
| LUBBOCK        | Aug. 10          | Overton Hotel and Conference Center<br>2322 Mac Davis Lane                   | 806.776.7000 |
| SAN ANTONIO    | April 20         | Norris Conference Center<br>Crossroads Mall,<br>4522 Fredericksburg Rd.      | 210.738.0040 |

\* New class locations for 2012.

# 4 WAYS TO REGISTER

ONLINE: [iiat.org](http://iiat.org)

PHONE: Call 800.880.7428, 8 a.m.–5 p.m. Monday through Friday to register with credit card.

FAX: Dial 512.469.9512 any time and charge registration to credit card.

MAIL: Mail registration form to: IIAT, P.O. Box 142363, Austin, TX 78714-2363.

## 2012 E&O LOSS CONTROL / CUSTOMER SERVICE REGISTRATION

Course Code: E010/CS10 & E011/CS11

(Copy this form to register additional students)

Name ..... Position  CSR  
 TDI #.....  Office manager  
 Agency .....  Producer  
 Mailing address .....  
 City/State/ZIP .....  
 e-mail..... Phone (.....).....

Class  E&O Loss Control Date: ..... City: .....  
 Customer Service Date: ..... City: .....  
 Both Classes Dates: ..... City: .....  
 Tuition (each class) \$135 each member/\$270 each nonmember

Check payable to IIAT enclosed for \$\_\_\_\_\_ Please check  Discover  Visa  MC  AMEX  
 Credit card # ..... Expiration date \_\_\_\_/\_\_\_\_  
 Name on card ..... Signature .....

Return to: IIAT, P.O. Box 142363, Austin, TX 78714-2363