

Connecticut Chapter ASCNET

RE: NOTICE OF MEETING

MEETING DATE: November 3rd

TIME: Registration, 8:30 am
Meeting starts at 9:00 am
Adjourns 2:30 - 3:00 pm

WHERE: Middlesex Mutual Conference Center
213 Court Street Middletown, CT
860-347-4621

COST: \$30 MEMBERS AND \$35 NON MEMBERS

INCLUDES: **Continental Breakfast and Lunch**



Presenter

Virginia M. Bates of *VMB Associates Inc.* -

Has over twenty years of experience consulting with agencies and carriers as well as managing insurance operations for both a carrier and a large regional agency. She has a background in all property and casualty lines, experience as director of a country-wide underwriting school and direct involvement in many industry automated systems.

CSR'S sale and rounding skills - Convince Principals, Managers and CSR's that risk analysis IS and HAS always been part of the CSR's job.

Agencies have automated and streamlined process so CSR's can focus more on the client and rounding out the client's coverages. Many CSR's are not comfortable or experienced in initiating that contact, explaining coverages proactively and successfully rounding the account. "CSR ACCOUNT ANALYSIS" was developed to assist principals and managers and service reps themselves in identifying what else needs to change in their agency in order for great service and rounding to happen. It give lots of examples of when and how to round for principals and managers and staff to take back to their agencies so that they can work with their own staffs to make them aware of rounding opportunities and able to exploit them. This session is often attended by both principals and CSR's. It helps them to get comfortable with the process, encourages good ideas about analyzing coverages in their accounts and gives them practice in typical client account review situations and how to explain coverages being recommended.

Management Reporting - Which every Agency should be doing.

Most agencies have sophisticated automated systems but have not determined how to use them to produce informative management reports. This is both a reflection of Principals and Managers unfamiliarity with technology and their system in particular, but also of difficulty knowing what information they should be studying. This class discusses the strategic financial, marketing, and retention goals of the agency and how management reports can and should be used to monitor the agency's being on or off "track" in achieving those goals.

This months meeting will target:
Agency Principals, Office Managers, CSR's

REPLY CARD

Please return to:

Thomas Fahy Insurance Associates
Attn: Linda Tenore
433 South Main Street Suite 118
West Hartford, CT 06110

Number Attending 11/3/11 Meeting _____

Amount Enclosed: _____

Please make your check payable to: ASCnet of CT

Also if possible provide e-mail addresses of attendees so handouts can be sent ahead of time.
Thank you.

E-Mail Address

*** Please respond by October 20th

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