



Insurance Agency Customer Service Training Sample

Issues

Customer Confusion.

A customer calls, complaining that his health insurance has been terminated. You note that he called, and put in a cancellation request earlier last month. It appears, that he said he was moving. How do you calm this customer?

Sample
Game
Cards

(Shown
smaller than
the Actual
3 1/8" by
2 1/4" size)

CSR Basics.

You answer a call from a gentleman complaining about the service he has received from one particular caseworker. What is the procedure for taking and routing this complaint?

Common Customer Concerns.

A woman is requesting specific information about her Disability Compensation claim. The investigator for this claim has this file listed as "Pending" and has taken no action, nor made any recommendations concerning her claim. What do you say to this anxious sounding woman?

Setting the Limits.

A person has called you with a request and then puts you on hold. How long will you wait before hanging up on the customer?

Taking the Next Step.

A customer is calling and asking why her Health Coverage Card has not arrived. You notice that her account is already showing a claim. What do you say or do?

Standard Operating Procedures

A business owner calls, asking if you would delay her automatic debit from processing for a day. She tells you that she is waiting for a cash payment from one of her customers and otherwise she will bounce a number of checks. What is your answer?

Areas of Judgment.

A nice customer is calling to say that she has received a cancellation notice. Your records show that her premium payment was short by three dollars. What do you tell this customer?

Standard Operating Procedures #2.

How do you insure that you do not give out account information to unauthorized individuals?