



CSR Development Program

Commercial Lines

The Customer Service Representative (CSR) Development Program delivers comprehensive insurance industry training combined with customer service and sales skills development. Designed specifically for this busy, fast-paced role, the CSR Development Program provides initial training for new commercial lines CSRs and opportunities for current CSRs to step up their performance.

Commercial Lines Course Curriculum

ISO Commercial Coverages

Sales Skills

Account Reviews

Practical Skills Application / Case Studies

Virtual Format / 10-Week Program

Q3 2021 Session: Begins July 19, 2021
Application deadline: July 2, 2021

Q4 2021 Session: Begins October 4, 2021
Application deadline: September 17, 2021

Tuition: \$899



CSR Development Program contact:
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Senior Training Specialist
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To enroll contact your Territory Manager.

CSR Development Program

What to expect:

- Dedicated learning time during office hours is required 8-10 hours per week.
- In-agency mentoring to support and coach the CSR. Estimated time commitment for the mentor is one hour per week.
- No license required, but strongly suggested because service topics included in curriculum.

Cancellation policy:

- Cancellations received 10 or more calendar days before the program start date will be fully refunded.
- Cancellations received less than 10 calendar days before the program start date will be refunded, minus \$250.
- No refunds will be given after the program start date.

See what participants are saying:



"I would highly recommend the training to anyone new or needing a refresher. My hope is that the program will be offered again in our agency to other CSRs."

- Customer Service Representative



"I have enjoyed and learned a lot from this class. It has been beneficial in my day-to-day work with actual clients and in assisting the department with their accounts."

- Customer Service Representative

Apply early as sessions sell out quickly!



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