

# Accredited Customer Service Representative (ACSR)

As a customer service professional, you must develop skills vital to effectively enhance customer satisfaction and retention. Recommended for agents, brokers, and customer service representatives, The Institutes' Accredited Customer Service Representative (ACSR) designation offers three line-of-business tracks to completion to ensure that you gain the knowledge needed to better serve your customers.

## BOTTOM-LINE BENEFITS

- Enhance profitability by managing a better book of business and avoiding E&O claims through a more comprehensive knowledge of insurance products
- Increase the ability to cross-sell products with a thorough understanding of client needs
- Improve overall efficiency with an increased confidence in capabilities and knowledge
- Develop customer loyalty by demonstrating higher levels of professionalism and customer service

## Core Courses

- ▶ ETHICS 311—ETHICAL GUIDELINES FOR INSURANCE PROFESSIONALS **OR**
- ▶ ETHICS 312—ETHICS AND THE CPCU CODE OF PROFESSIONAL CONDUCT
- ▶ ACSR 4—AGENCY ERRORS AND OMISSIONS
- ▶ ACSR 5—PROFESSIONAL DEVELOPMENT & ACCOUNT MANAGEMENT

## Personal Lines Track

- ▶ ACSR 1—HOMEOWNERS INSURANCE
- ▶ ACSR 2—PERSONAL AUTOMOBILE INSURANCE
- ▶ ACSR 3—PERSONAL LINES RELATED COVERAGES

## Commercial Lines Track


- ▶ ACSR 6—COMMERCIAL PROPERTY INSURANCE
- ▶ ACSR 7—COMMERCIAL LIABILITY INSURANCE
- ▶ ACSR 8—COMMERCIAL AUTOMOBILE INSURANCE
- ▶ ACSR 9—COMMERCIAL LINES RELATED COVERAGES

## Life/Health Track

- ▶ ACSR 10—LIFE INSURANCE
- ▶ ACSR 11—RETIREMENT PLANNING
- ▶ ACSR 12—DISABILITY AND HEALTH INSURANCE

## Join the Conversation

Share knowledge and information with other insurance professionals around the world.

 Join The Institutes' online community at: [community.TheInstitutes.org](https://community.TheInstitutes.org).

Also join us on   

The Institutes' **Accredited Customer Service Representative (ACSR)** designation program provides practical and relevant customer service skills and technical insurance knowledge. Earning the ACSR designation conveys your commitment to excellence and professionalism in customer service. Additionally, the ACSR designation distinguishes you as being prepared to meet the complex insurance challenges your clients face.

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## Did You Know?

**3** Available Tracks to Completion

**4+** Flexible Learning Delivery Options

**10+** Courses Designed to Enhance Your Customer Service Skill Set

**23+** Continuing Education (CE) Credits for Completing the Designation in Most States

## Here's What Insurance Professionals Had To Say:

“ This designation benefits individuals by helping them illustrate their commitment toward enhancing the quality of service provided to their clients. Achieving the designation also **demonstrates a high level of professionalism to an agency's customers and/or prospective customers.**”

Jennifer Kacmarsky, ACSR  
Director of Education, Independent Insurance Agents & Brokers of New Jersey

“ I have worked with the ACSR program in many capacities, from sitting on curriculum review committees, to teaching the classes in my state, to recommending it to my own colleagues and office staff. From the comments I have received, I know that participants love the curriculum and find it interesting and useful in their jobs.

I find that **people always want to move quickly through the program because they feel like they gain so much from it—knowledge that helps them progress in their field and achieve their goals.** I have had every level of student in my classes from very new to the industry all the way up to agency principles 'who just needed the hours.' But they all have the same reaction: 'Wow. I learned something new today.' I highly recommend ACSR to anyone looking to learn a new area of our trade, refresh their knowledge or advance in their existing area, or earn a designation that is recognizable and respected in our industry. ”

Patty S. Padon, AAI  
Benefits Consultant, Pat Campbell Insurance, LLC

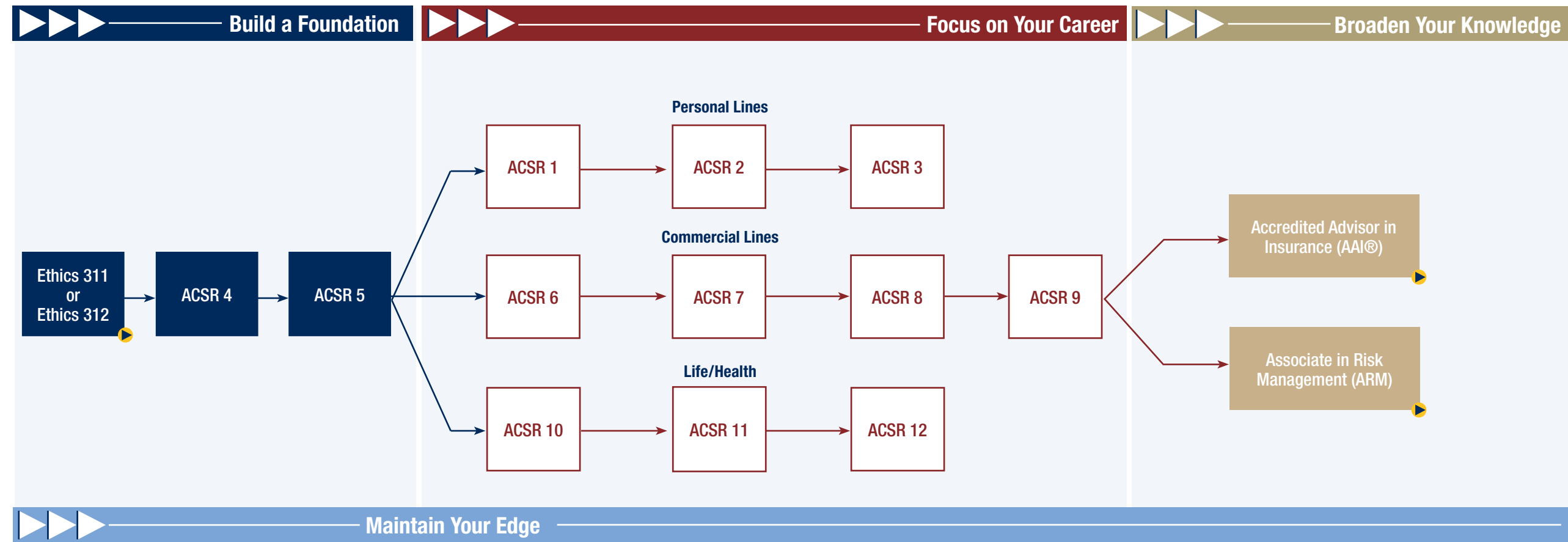
“ Professional development with The Institutes **opens up doors and expands the horizon of opportunities available to you.** Institute designation programs and courses teach you how to think more broadly and, in the process, help you gain recognition from your peers and management. With any industry, the more you learn, the better you can perform on the job, and the insurance and risk management industries are no different. ”

Randall Clinger, CPCU, ARe  
Vice President, Head of Marketing Communications, Swiss Re America Holding Corporation

Turn the page for more information and learn more online at [www.TheInstitutes.org/ACSR](https://www.TheInstitutes.org/ACSR)

# MODEL PROGRAM PATH FOR THE ACCREDITED CUSTOMER SERVICE REPRESENTATIVE

To order study materials, register for exams, or for detailed course or program information, visit [www.TheInstitutes.org](http://www.TheInstitutes.org)



▶ This course applies to multiple Institutes programs. See [www.TheInstitutes.org](http://www.TheInstitutes.org) for details.

## Build a Foundation

- ▶ 311—Ethical Guidelines for Insurance Professionals or 312—Ethics and the CPCU Code of Professional Conduct

Establish a practical ethical decision-making framework for any property-casualty insurance or risk management insurance career.

- ▶ ACSR 4—Agency Errors and Omissions

Support your agency's profitability by accurately identifying and assessing errors and omissions risks.

- ▶ ACSR 5—Professional Development & Account Management

Increase value to your agency and producers with a solid understanding of how to build and retain customer relationships.

## Focus on Your Career

### Personal Lines

- ▶ ACSR 1—Homeowners Insurance

Increase value to your agency with a strong understanding of the property and liability coverages that properly protect your customers.

- ▶ ACSR 2—Personal Automobile Insurance

Develop the decision-making and problem-solving skills needed to recommend coverages that properly protect an individual's automobile from loss.

- ▶ ACSR 3—Personal Lines Related Coverages

Improve your customers' experiences with an enhanced ability to accurately identify and assess personal loss exposures.

### Commercial Lines

- ▶ ACSR 6—Commercial Property Insurance

Gain the confidence to accurately and efficiently identify and assess commercial loss exposures.

- ▶ ACSR 7—Commercial Liability Insurance

Increase customer satisfaction with your enhanced ability to recommend coverages that properly protect business owners from liability loss exposures.

- ▶ ACSR 8—Commercial Automobile Insurance

Develop the decision-making and problem-solving skills needed to recommend coverages that properly protect business owners from commercial auto loss exposures.

- ▶ ACSR 9—Commercial Lines Related Coverages

Increase value to your agency and producers with a strong understanding of commercial lines coverages.

### Life/Health

- ▶ ACSR 10—Life Insurance

Develop a strong understanding of life and health insurance coverages to better serve your customers.

- ▶ ACSR 11—Retirement Planning

Improve the customer experience with your enhanced ability to identify retirement plans specific to an individual's needs.

- ▶ ACSR 12—Disability and Health Insurance

Add value to your agency by learning to confidently recommend disability and health coverages that meet an individual's specific planning needs.

## Broaden Your Knowledge

- ▶ **Accredited Advisor in Insurance (AAI®)**

The Accredited Advisor in Insurance program gives you the tools you need to establish a clear professional advantage in the marketplace and fulfill your commitment to customer service.

- ▶ **Associate in Risk Management (ARM)**

Enhance your risk management skills and learn how to build and implement a balanced risk financing strategy using retention, transfer, and hybrids.

## Maintain Your Edge

- ▶ **Continuing Education (CE)**

Maintain license compliance through convenient online CE with our CEU.com range of courses.

Visit [www.ceu.com](http://www.ceu.com) for a current course listing.

- ▶ **Online Learning**

Fill gaps in your technical knowledge with The Institutes' growing collection of more than 300 self-study online courses.