



Customer Service Excellence in Insurance



Online Course

Introduction

Course Overview

The modules of the Customer Service Excellence in Insurance will make your road to learning about this aspect of insurance more effective, easier and more enjoyable than ever. Its streamlined approach strikes a careful balance between depth of coverage and ease of learning. Its world-class learning design - with insightful examples, thought primers, learning activities, case studies, review questions, and tutorial questions - ensures that you will come to class well prepared and leave with a richer understanding of the subject theory and practices.

In your professional journey with Customer Service Excellence in Insurance, you will develop knowledge and understanding of the importance of customer service in a financial services environment. In particular, you will explore the knowledge and skills employees need to have to deliver exceptional customer service in the insurance industry.

Learning Outcomes

By the end of this course, you should be able to:

- Outline the parameters of customer service;
- Distinguish between insurance as an intangible product and other tangible products;
- Explain the importance of customer service in a service industry;
- Examine the competitive advantage derived from excellence in customer service; and
- Discuss what constitutes customer service excellence.



Module 1: Introduction to Customer Service

Learning Outcomes

On completion of this module, you should be able to: -

- Define customer service;
- Understand the concept of customer culture;
- Identify the role of customer service;
- List the six major components of a customer-focused environment; and
- Explain how organisations are delivering excellence in customer service.

What is Covered

What Is Customer Service?

- Defining 'customer service'
- Role of customer service
- Creating a customer service culture
- Customer service environment

Customer Service and Customer Behaviour

- Effects of customer service

Excellence in Customer Service

- Customer needs and wants
- Customer expectations
- Exceptional customer experience
- Customer satisfaction, service quality, and customer retention
- Customer loyalty

Module 2: The Customer-Centric Organisation

Learning Outcomes

On completion of this module, you should be able to: -

- Understand the importance of treating customers as partners;
- Understand how to manage and implement customer service standards;
- Recognise how to leverage customer service;
- Describe the importance of teamwork in customer service; and
- Identify the primary characteristics of customer service.

What is Covered

Customer-Focused Culture

- Customer becomes a partner
- Leveraging customer service

Organisational Teamwork in Customer Service

- Team development
- Characteristics of a good customer service team
- Empowered customer service

Service Excellence Strategy

- Monitoring customer service levels
- Evaluating the quality of customer service
- Setting customer service standards
- Developing an excellent customer experience strategy
- Understanding stagnation in customer experience
- Better customer service

Module 3: Technology and Benchmarks for Customer Service Excellence

Learning Outcomes

On completion of this module, you should be able to:

- Discuss the important role that technology plays in customer service excellence;
- Identify how technology has changed customer service;
- Describe customer service processes and measurement; and
- Outline the operational benefits of using technology in customer service.

What is Covered

Customer Service Technology

- Personalised experience
- Access to information
- Service channels
- Shifting from traditional phone lines to web - based services
- Customer Contact Centre
- Blending customer interaction to boost productivity

Technology and Benchmarks

- How technology has changed customer service

Customer Service Processes and Measurement

- Key Performance Indicators (KPIs) of customer service

Better Customer Service Through Technology

- Tapping into web - based and mobile technologies
- Benefits of social media for the organisation

Module 4: The People Who Drive Customer Service

Learning Outcomes

On completion of this module, you should be able to:

- Outline how human resources are used in the development of people supporting the customer service role; and
- Explain the processes and benchmarks used in the development of customer service excellence support in the insurance industry.

What is Covered

Key Stakeholders of Customer Service Excellence

- Structure of the insurance industry
- Philosophy and service culture of an organisation
- Internal and external resources

Selection of the Right Staff and Equipment

- Sources of recruitment
- Recruitment process
- Selection criteria
- Procurement of appropriate equipment

Training and Development of Recruited Staff

- Budgeting and planning
- Internal and external training and development programmes
- Evaluation of training effectiveness

Evaluation of Staff Effectiveness

- Framework of evaluation and standard of performance
- Importance of customer feedback management
- Progressive and summative evaluation
- Methodologies and benchmarks used in evaluation

Motivation of Customer Service Staff

- Understanding What Motivates an Individual
- Using Recognition and Incentives
- Factors Influencing a Sustainable and Motivated Customer Service Team

Module 5: Understanding The Customer

Learning Outcomes

On completion of this module, you should be able to: -

- Identify customers' wants and needs by assessing their expectations and perceptions; and
- Discuss how insurers meet customer's wants and needs using available resources based on effective communication.

What is Covered

The Role of the Customer

- Customer is the basis of all business
- Understanding customer expectations
- Understanding customer perception

Meeting Customer Expectations

- The 7 P's of marketing in meeting customer expectations
- Resources and limitations
- Customer - Driven service design and standards
- The role of branding in customer expectations

Communication in Customer Service

- Basics of communication
- Internal communication in customer service
- External communication to customers

Effective Communication in Customer Service Excellence

- What is to be communicated?
- Communication media
- Contact Centre as a key communication medium
- Measuring the effectiveness of communication

Module 6: Managing The Customer

Learning Outcomes

On completion of this module, you should be able to:

- Distinguish between different kinds of customers;
- Discuss how to use customer data and feedback for customer management;
- Explain how customer service staff proactively interact with customers using various media within the context of the customer life cycle; and
- Design a customer service model of excellence, which includes customer care best practices within the context of the customer care cycle.

What is Covered

Listening to and Understanding the Customer

- Customer segmentation
- Effective use of customer data and segmentation
- Listening skills
- Process of handling customer feedback or complaints

Interacting with Customers

- The 5 A's of customer contact
- Proactive customer contact
- Role of social media in customer interaction
- Customer lifecycle

Succeeding in Customer Service

- Model of excellence
- The customer care cycle
- Developing best practices in customer care

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Contact us on:

Phone: +254 30 6530128 | Safaricom: +254 723 334 408 | Airtel: +254 733 812 695

Email: training@iiea.co.ke or info@iiea.co.ke



**Insurance Institute of East Africa
Brunei House, 3rd Floor | Witu Road off Lusaka Road
P.O. Box 16481-00100 Nairobi, Kenya
Tel: +254 20 6530128 | 6530298
Mobile: +254 723 334 408 | 733 812 695
Email: info@iiea.co.ke | www.iiea.co.ke**