



## The Customer Service Excellence Program

The Customer Service Excellence Program is a comprehensive and engaging training program designed to strengthen customer connection with clients, coworkers, and partners throughout the insurance industry.

The curriculum will offer skills and techniques to gain results and create a positive experience for both external and internal customers. Upon completion of the live workshop sessions, you will receive a program certificate.

Here is a glimpse of the upcoming program, workshop titles and dates:

- **Workshop 1: Customer Centricity – Mindful Service – February 25**
- **Workshop 2: Customer Communication – March 4**
- **Workshop 3: Email Essentials – March 11**
- **Workshop 4: Leading Difficult Customer Calls with Confidence – March 18**
- **Workshop 5: Time Management Success – March 25**
- **Workshop 6: Introduction to Negotiations – April 1**

Each workshop will take place via Zoom from 9:00-10:30 am Central Time

The workshop link will be shared upon registration.

All sessions are lead by New Level Partners (NLP), a learning solutions provider specializing in the insurance industry. NLP leads engaging learning experiences. Please plan to join with your cameras “on” and ready to collaborate. All attendees will receive preworkshop information three weeks prior to the February 25 workshop.

Our industry continues to evolve. Aim to grow and learn new techniques to achieve success!

Thank you!

## Workshop Descriptions



### **Workshop 1: Customer Centricity – Mindful Service** February 25

We will define the personas and expectations of your customers in today's environment. What are the impactful moments and opportunities where you can make a difference? Ready your value pitch on how you and Builder's Mutual deliver excellence.



### **Workshop 2: Customer Communication** March 4

An impression is made within a snap! How can you create a positive impression even when you must deliver a difficult message? Gain communication techniques to deliver action forward messages with confidence.



### **Workshop 3: Email Essentials** March 11

Every email is an opportunity to build a stronger relationship with the reader. Your mission is to find ways to improve your email habits to create a positive impression, promote your brand, and achieve effective results and responses.



### **Workshop 4: Leading Difficult Customer Calls with Confidence** March 18

"In the heat of the moment" – we may find ourselves struggling to respond positively. There are difficult customer calls and conversations that challenge us in our roles. You will gain approaches and techniques to use in future challenging conversations.



### **Workshop 5: Time Management Success** March 25

When was the last time you took a step back to assess your time management habits? After this workshop, you will look at your to-do list differently on where and how you spend your time to gain the most productivity in your day.



### **Workshop 6: Introduction to Negotiations** April 1

The insurance industry is a natural negotiation culture. Regardless of role, you will be negotiating with someone at some point. You will be able to prepare for negotiations, understand interests, and prepare calibrated questions.