

## the **CLIPS** program

CLIPS (Commercial Lines Installation Process and Systems) is a 5 day, onsite coaching system developed to improve the structure, profitability and overall success of insurance brokers Commercial Lines Divisions.

The strategy behind the CLIPS Program is to drive commercial lines profitability through a multi-faceted organizational system. By creating standardized CSR workflows, the program facilitates the development of commercial lines departments through the distinction between Producer and CSR functions.

By enabling CSR's with the ability to perform their assigned responsibilities, it frees Producers from the backstage which generates the opportunity for new business and increased client retention. Systematic, organized office systems maximize employee productivity and retention, creates accountability, reduces brokerage exposure to E&O claims, while creating an operating platform for scalable growth.

### **The CLIPS training program provides brokerages with:**

- Simple, clearly defined efficient workflows around the processing of New Business, Renewals, Endorsements and Claims.
- Clear definition of CSR and Producer roles.
- Revenue generating opportunities.
- Time management systems to eliminate backlog and reduce E&O exposure.
- Clearly organized, efficient office systems.

### **The CLIPS Program is accredited by:**

- **RIBO** - 6 Management; 12 Personal Skills
- **ICBC** - 10 Professional; 24 Technical
- **ICM** - 6 Management; 24 Team
- **ChAD** - 23 UFC Administration
- **AIC** - 30 General Insurance
- **ICS** - 15 General

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