

The **Associate in Insurance Services** program is a nationally recognized continuous improvement educational program designed specifically for insurance personnel. By completing the AIS program, you'll gain a basic understanding of continuous improvement principles that will help you attract new clients while retaining current customers. Plus, the AIS program provides you with several completion options so that you can customize the program to meet your specific technical insurance knowledge needs.

## Sharpen Your Customer Focus.

### Bottom-Line Benefits of AIS:

- Improve service quality by gaining an understanding of customer needs and motivations
- Increase productivity and efficiency by learning to identify and improve key business processes
- Ensure consistency by learning how to effectively monitor and adjust to change

**Course Level:** Beginner

### Earn a Designation or Certificate. The Choice is Yours.

You can earn a Certificate of Completion just for passing the AIS 25 course exam. Or you may choose to earn the AIS designation by completing one of the following options in addition to passing the AIS 25 exam:

Accredited Adviser in Insurance (AAI®)	Associate in Reinsurance (ARe)
Associate in Claims (AIC)	Associate in Risk Management (ARM)
Associate in Commercial Underwriting (AU)	Associate in Surplus Lines Insurance (ASLI)
Associate in Fidelity and Surety Bonding (AFSB)	CPCU 510, 520, 551, 552, and 553
Associate in Marine Insurance Management (AMIM)	CPCU 510, 520, 555, 556, and 557
Associate in Personal Insurance (API)	The Program in General Insurance (INS)
Associate in Premium Auditing (APA®)	Associated in General Insurance (AINS)

**We Recommend AIS for:** Administrative and support staff, agents/brokers, agency principals, claim adjusters, call center personnel, customer service representatives, line of business managers, and underwriters

**Topics Covered in AIS 25—Delivering Insurance Services:** Continuous Improvement and Insurance, Customer Identification, Customers and Quality, Benefits of Customer Orientation, Process Management, Process Improvement Model and Tools, Leadership/Teamwork/Organizational Structures, and Monitoring Progress

**Exams:** One

**Completer Info:** Passing the AIS 25 exam earns a certificate of completion. Earning the designation requires passing other exams in addition to the AIS exam. Log on to our Web site for more information.

### New Ethics Requirement

Ethical behavior is crucial to preserving the trust on which insurance transactions are based and also the public's trust in our industry. That's why, starting in 2011, completing the free online *Ethical Guidelines for Insurance Professionals* will be required for all associate designation programs. Log on to [www.TheInstitutes.org/ethics](http://www.TheInstitutes.org/ethics) for information and sign up for free.

### Study Aids

Available for certain courses, our SMART Study Aids include flash cards, review notes, and online practice exams. They supplement the text and course guide to help you retain key concepts and maximize your study time. Learn more on our Web site, [www.TheInstitutes.org](http://www.TheInstitutes.org).

### Online Courses

Did you know The Institutes offer hundreds of online courses, including instructor-led and self-study courses? Try them for yourself at [www.TheInstitutes.org](http://www.TheInstitutes.org).

### Continuing Education

Most of The Institutes' courses are approved for CE credit in most states. You can also earn CE credit quickly and cost-effectively through our CEU.com business unit. Log on to our Web site to learn how to earn CE credit with The Institutes.

### Questions

For more information and to take advantage of The Institutes' free educational advising service, please contact Customer Service at [customerservice@TheInstitutes.org](mailto:customerservice@TheInstitutes.org) or call (800) 644-2101. You can also visit us online at [www.TheInstitutes.org](http://www.TheInstitutes.org), where you will find everything you need to know about registering for exams, purchasing study materials, and more.

### About The Institutes

The Institutes are the leader in delivering proven knowledge solutions that drive powerful business results for the risk management and property-casualty insurance industry.

The Institutes' knowledge solutions include the CPCU designation program; associate designation programs in areas such as claims, risk management, underwriting, and reinsurance; introductory and foundation programs; online courses; research; custom solutions; assessment tools; and continuing education (CE) courses for licensed insurance professionals and adjusters through its CEU.com business unit.

“Professional development with The Institutes opens up doors and expands the horizon of opportunities available to you. Institutes 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 exception.”

—Randall Clinger, CPCU, ARe

Vice President, Head of Marketing Communications  
Swiss Re America Holding Corporation

## YOUR PROFESSIONAL DEVELOPMENT PLANNER

### PHASE I

To fully understand the insurance industry and develop the ability to apply fundamentals in your daily work, you need a solid foundation in core concepts and principles.

**Insurance Essentials**

**Online Learning Fundamentals Courses**

**Company-Specific Training:**  
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**Introduction to:**  
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### PHASE II

Once you have an overall understanding of the industry, you'll be able to benefit from more-technical knowledge. Choose a generalist (**G**) or specialist (**S**) approach, depending on your needs.

**Associate in General Insurance (G)**

**Online Learning (S):**  
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**Associate in Insurance Services**

**CPCU (G)**

**Company-Specific Training (S):**  
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### PHASE III

Professional development should continue throughout your career so you can stay current on the latest industry practices and refine your technical insurance knowledge.

**Online Learning**  
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**Associate in:**  
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**CPCU**

**Company-Specific Training:**  
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