TOTAL CSR

12 Training Meetings Your Team Will Actually Use

Commercial lines facilitator guide

Twelve ready-to-run, 15-minute conversations that turn everyday service problems into better team habits. Use one each week or select the guide that matches your team's current challenge.

Prepare in five minutes

- Choose the guide and read its facilitator notes. Bring the relevant approved agency procedure and a blank practice record.
- Name a facilitator and timekeeper. Use fictional or sanitized account details. Keep live client decisions outside the exercise.
- Invite people to explain their reasoning before showing the suggested response. Agree on one behavior to practice.

What success looks like

Each meeting ends with a specific action someone can demonstrate. Review the work at the next meeting; attendance alone does not show that a habit changed. Adapt examples to your agency's systems, authority, and procedures.

Use the final tracker to record the exercise, its owner, and evidence of completion. Suggested follow-up deadline: the next meeting.

Use the same 15 minute rhythm

MINUTES		WHAT TO DO
1	0 to 2	Review the last follow-up. At the first meeting, ask where the team gets stuck.
2	2 to 4	Read the scenario aloud and give everyone quiet thinking time.
3	4 to 9	Discuss the three prompts. Invite at least two different perspectives.
4	9 to 13	Complete the practice activity and compare it with the facilitator notes.
5	13 to 15	Assign the single follow-up exercise and record the owner and due date.

The 12 meetings

01 Prioritize the work **that cannot wait**

02 Get a complete request **the first time**

03 Write a note **someone else can use**

04 Make a handoff **that is actually accepted**

05 Keep a renewal moving **with missing information**

06 Catch inconsistent **submission information**

07 Update a client **before they have to ask**

08 Ask an escalation question **that can be answered**

09 Check the issued document **against the request**

10 Recover from **a service mistake**

11 Cover an absent teammate **without losing work**

12 Prove a new workflow **is ready to use**

01 Prioritize the work that cannot wait

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

At 9 a.m., you have a cancellation notice effective tomorrow, a certificate request for a job starting today, and a routine address change. All three emails say urgent.

DISCUSSION PROMPTS

1. Which facts and deadlines must you verify first?
2. Who should own each request while you investigate?
3. What will you tell each client about the next update?

PRACTICE TOGETHER

Sort the three requests and write the first action, owner, and update time for each.

FACILITATOR NOTES

Assess consequences and verified deadlines, then use the agency's escalation rules. Do not infer that a certificate can be issued or a cancellation reversed. Acknowledgment is different from completion.

ONE FOLLOW UP EXERCISE

Apply the same triage method to one sanitized work queue and bring three examples with owners and next actions.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

02 Get a complete request the first time

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

A client emails: We bought another truck. Add it today. No vehicle details, ownership information, use, or requested effective time are included.

DISCUSSION PROMPTS

1. What information is missing from the request?

2. What can you acknowledge before the change is confirmed?

3. Where will the request and follow-up be tracked?

PRACTICE TOGETHER

Draft a short reply using the agency's approved intake requirements.

FACILITATOR NOTES

Ask relevant questions in one organized request. Identify the policy and entity, confirm missing details, route within authority, and track the response. Never equate receipt of the email with a completed policy change.

ONE FOLLOW UP EXERCISE

Use the approved intake checklist on one practice request and highlight the information you would otherwise have missed.

OWNER **DUE**

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

03 Write a note someone else can use

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

The account note says: Talked to client. All good. The employee is out tomorrow and a colleague must handle a follow-up.

DISCUSSION PROMPTS

1. What would a colleague need to know?
2. Which facts should be separated from assumptions?
3. What makes the next action unmistakable?

PRACTICE TOGETHER

Rewrite the note with a fictional date, request, facts, action, owner, and due time.

FACILITATOR NOTES

A useful note records the request, verified facts, what was communicated, what remains open, and who acts next. Include the location of supporting correspondence; do not paste unnecessary sensitive information.

ONE FOLLOW UP EXERCISE

Rewrite one sanitized note and ask a teammate to identify the next action without asking you for clarification.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

04 Make a handoff that is actually accepted

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

A producer forwards a renewal request to a shared inbox. The producer assumes service owns it; service assumes the producer is still collecting information.

DISCUSSION PROMPTS

1. What event transfers ownership?
2. How can the receiver confirm acceptance?
3. What happens if nobody accepts by the deadline?

PRACTICE TOGETHER

Role-play a handoff and an explicit acceptance in the agency's designated system.

FACILITATOR NOTES

Forwarding does not establish ownership. Name the receiving person or queue, expected action, deadline, missing items, and escalation route. Follow the agency's rule for responsibility until acceptance.

ONE FOLLOW UP EXERCISE

Document one practice handoff with the receiving owner's acknowledgment and the next due date.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

05 Keep a renewal moving with missing information

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

A renewal is approaching. The client has not returned updated payroll and operations information. Last year's application is available.

DISCUSSION PROMPTS

1. What can proceed and what requires current facts?
2. How will you describe missing information to the client?
3. When and to whom will you escalate?

PRACTICE TOGETHER

Build a three-step follow-up plan with dates and an owner.

FACILITATOR NOTES

Do not present old information as newly verified. Identify what is missing, why it matters, the requested response date, and the agency's escalation point. Preserve the communication history.

ONE FOLLOW UP EXERCISE

Create a dated follow-up plan for one fictional renewal with two missing items and a clear escalation trigger.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

06 Catch inconsistent submission information

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

The application lists 12 vehicles, the schedule lists 14, and the client's email says two were sold. A quote request is due this afternoon.

DISCUSSION PROMPTS

1. Which source needs clarification?
2. What can you send without representing uncertain data as fact?
3. How will you document the resolved version?

PRACTICE TOGETHER

Create a discrepancy list and draft the clarification question.

FACILITATOR NOTES

Do not choose the convenient number or silently revise a schedule. Reconcile the source, confirm the current facts with the responsible party, and keep a dated final version. Escalate the deadline if needed.

ONE FOLLOW UP EXERCISE

Reconcile a fictional three-document packet and record each discrepancy, resolution, and final source.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

07 Update a client before they have to ask

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

You promised an update today. The carrier has not responded, and the client needs a decision for tomorrow's project.

DISCUSSION PROMPTS

1. What useful information can you share now?
2. Which promises are within your control?
3. What escalation is appropriate given the client's deadline?

PRACTICE TOGETHER

Write a four-sentence update with status, action taken, next step, and next contact time.

FACILITATOR NOTES

Say what is known and what is still pending. Promise a follow-up you can control, not carrier action or coverage. Escalate the deadline and record the update in the account file.

ONE FOLLOW UP EXERCISE

Send your manager a practice status update for a delayed request using the four-sentence structure.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

08 Ask an escalation question that can be answered

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

A teammate messages: Can you look at this? The recipient receives a long email thread with no question or deadline.

DISCUSSION PROMPTS

1. What decision or help is needed?
2. Which facts and documents belong in the escalation?
3. What work can the sender do within their authority first?

PRACTICE TOGETHER

Rewrite the escalation in five lines: issue, deadline, known facts, work done, specific ask.

FACILITATOR NOTES

A focused escalation names the decision, impact, supporting source, and uncertainty. It does not bury the request in a forwarded thread or suggest a conclusion unsupported by the file.

ONE FOLLOW UP EXERCISE

Turn one fictional vague escalation into a five-line request and have a colleague restate the decision needed.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

09 Check the issued document against the request

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

An issued endorsement arrives. The requested address is correct, but the effective date differs from the documented instruction.

DISCUSSION PROMPTS

1. What records should you compare?
2. Who can resolve the discrepancy?
3. How will you prevent the item from being marked complete too soon?

PRACTICE TOGETHER

Draft the discrepancy note and the follow-up task.

FACILITATOR NOTES

Check against the approved request and relevant confirmation, using the agency's checking procedure. Flag differences, route for resolution, keep ownership, and verify the corrected document before closing.

ONE FOLLOW UP EXERCISE

Check a fictional issued document against its request and record each difference and the resolution owner.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

10 Recover from a service mistake

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

You discover that a client request was saved to the wrong account and has not been acted on. The client asks for an update.

DISCUSSION PROMPTS

1. What must happen immediately under agency procedure?
2. Which facts can you communicate accurately?
3. What change would prevent this particular mistake?

PRACTICE TOGETHER

Map discovery, escalation, correction, client update, and verification.

FACILITATOR NOTES

Preserve an accurate record. Escalate promptly through agency incident procedures; avoid guessing about consequences or making unauthorized promises. Identify an owner to confirm the correction and communicate next steps.

ONE FOLLOW UP EXERCISE

Complete a fictional incident review with the cause, corrective action, verification step, and one prevention change.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

11 Cover an absent teammate without losing work

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

An account manager is unexpectedly absent. Open items are split among their inbox, personal reminders, and the agency management system.

DISCUSSION PROMPTS

1. What should the backup review first?
2. How will you establish temporary ownership?
3. What should be handed back when the employee returns?

PRACTICE TOGETHER

Create a three-item coverage list with owner, due time, status, and source.

FACILITATOR NOTES

Use approved access and shared work records. Assign temporary owners and check deadlines. Avoid duplicate action by recording who is handling each item and what remains pending.

ONE FOLLOW UP EXERCISE

Build a sanitized absence handoff for one practice account and have the backup identify every next action.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

12 Prove a new workflow is ready to use

15 MINUTES | Prepare the relevant approved procedure and a blank practice record.

SCENARIO

A new service process has been announced. Everyone attended the presentation, but employees still use different task codes and completion rules.

DISCUSSION PROMPTS

1. What must each person be able to do independently?
2. Which errors should prevent independent use?
3. How will exceptions and questions be handled?

PRACTICE TOGETHER

Have one person explain the process and another complete a practice case using the approved guide.

FACILITATOR NOTES

Use observable work: correct entry point, owner, documentation, escalation, and closeout. Record mistakes and targeted coaching. Set a reassessment date rather than treating attendance as proof of readiness.

ONE FOLLOW UP EXERCISE

Complete one approved practice case independently and have a reviewer record pass, coaching needed, or reassessment due.

OWNER

DUE

TEAM COMMITMENT OR COACHING NOTE

TIMING: **0–2** review | **2–4** scenario | **4–9** discussion | **9–13** practice | **13–15** commitment

Meeting follow up tracker

Write a specific owner for each exercise. Review evidence before marking it complete. Duplicate this page for another team.

Meeting	Date and owner	Evidence reviewed and next step
☐ 01 Prioritize the work that cannot wait		
☐ 02 Get a complete request the first time		
☐ 03 Write a note someone else can use		
☐ 04 Make a handoff that is actually accepted		
☐ 05 Keep a renewal moving with missing information		
☐ 06 Catch inconsistent submission information		
☐ 07 Update a client before they have to ask		
☐ 08 Ask an escalation question that can be answered		
☐ 09 Check the issued document against the request		
☐ 10 Recover from a service mistake		
☐ 11 Cover an absent teammate without losing work		
☐ 12 Prove a new workflow is ready to use		

Turn the discussion into practice

Use the patterns you observe to choose the team's next training priority. Total CSR helps keep employee development part of the agency's ongoing conversation.

TOTAL CSR