

# MANAGER SPOTLIGHT

## A Little Integrity Goes a Long Way



**Rich Morton, AIM,  
ARM, SCLA  
Senior Regional  
Claims Manager  
Universal Underwriters**

Are you willing to go the extra step and take the extra time to get it right?

Rich Morton, senior regional claims manager at Universal Underwriters in Framingham, MA, is, and believes it has played a key role in his success in the insurance industry.

Rich began his career in 1976 as a field road adjuster. Over the course of his career, he has held the positions of trial adjuster, supervisor, home office examiner, and claims manager. He joined Universal Underwriters in 1988 and says the accomplishment of which he is most proud is serving in his current position.

“I love the variety and daily challenge of the job, as well as the interaction with my insureds, sales, and underwriting,” Rich said.

He also loves to run seminars on discrimination, truth and lending, and loss prevention. His broad background in many types of claims and coverages is only one of his strengths. His ability to motivate others is another.

That motivation factor stems from the influence of Bill Pierson, his original supervisor at Liberty Mutual.

“Bill taught me to enjoy the job and find something positive in every case. He taught me that we have the ability to assist someone who has been harmed, whether it’s a claimant or an insured, they are all our customers,” said Rich.

The most important thing he has learned in his career is that one should never be satisfied with how much he/

she has already learned.

“There is always a way to be smarter, better, and more in tune with the industry. Always be open to learn and benefit from your experiences,” Rich said. “Treat your position as a career and not a job. Push yourself to do better, learn more, accept and relish the daily challenge. Each call—each claim, is an opportunity to assist others.”

As for Rich Morton’s future ambitions, he has one more exam to complete before receiving his CPCU certification.

“Each day is a challenge with daily changes, with new opportunities for growth and promotion, and I just want to keep my options open,” he said. His philosophy is, “Don’t make decisions because they’re easy, don’t make them because they’re cheap, don’t make them because they’re popular; make them because they’re right,” a quote by Notre Dame’s Father Theodore Hesburgh.

## new courses

### Effective Recorded Statements

This full day, eight-hour class offers invaluable skills for the claims person to obtain the most effective recorded statement from any person of interest in a claim. All skills will be reinforced with the use of practice scenarios and role-plays to increase effectiveness of this very important evidence-preserving function.

It is a highly interactive class that gives the student techniques for laying a solid foundation when taking statements. All types of claims situations will be reviewed to emphasize the importance of this everyday task of claims handlers.

Many times a well-experienced claim representative finds

that after conversing with a party at length, they did not either record the conversation or failed to ask pertinent questions. In this class they will discover how proper preparation, development of a strategy, and effective listening skills can produce a valuable piece of the claims process.

Here are the topics students will learn:

- Gaining Trust and Cooperation of the Customer
- Avoiding the Claims Hammer
- When and Who to Interview
- Proper Preparation Techniques
- Preparation of the Interviewee
- Effective Listening and Allowing Silence
- Legal Issues of Statement Taking