

STUDENT OF THE QUARTER

Field rep is living the life she envisioned back in high school



Lisa Walters
Claims Representative
Acuity Insurance

When Lisa Walters knows what she wants, she goes out and makes it happen, even if it happens the second

time around.

Working in the loss and damage department at a local trucking company straight out of high school, Walters was attracted to the freedom and flexibility entrusted to field claims representatives at an insurance company. In 1993, she submitted an application for an inside claims position at an insurance company in her hometown.

“But I learned quickly that I was not cut out to sit behind a desk,” said Walters. “I wanted to be out in the field where I

knew I could help more people.”

With a new baby and additional responsibilities at home, Walters left insurance to become the branch manager for an auto rental agency. After two-and-one-half years, the desire to help people remained strong, and she re-applied to the new management at Acuity Insurance in 2000 in hopes that she could earn the opportunity to become a field claims rep.

“I may work a lot of hours, but it’s my own schedule and I am able to help policyholders and be there for my daughters when they need me.”

Wurzer remembered the same scenario. He said Walters impressed him with the customer service skills she had learned at the rental agency, and with her sales skills.

“Recently, I gave Lisa the challenge

to improve teamwork and the overall flow in the office,” said Wurzer. “She has taken on this project as her own mission. And the results have been amazing.”

For Walters, flexibility in her schedule might mean starting her day meeting with clients at 5:30 am or working the next day until 10pm. But in between, her schedule leaves plenty of time to focus her attention on her husband and two daughters, ages three and 13.

Acuity Insurance assigns its claims by zip code, so Walters has the chance to handle virtually every conceivable incident from an auto claim involving a simple fender bender, to commercial accounts with heavy storm damage and loss of business coverage.

Her most enjoyable work is with hom-

Student of the Quarter see page 19

TRAINER OF THE SEASON

Education resembles the movies for baseball fan in Southern California



Teresa Ramos
Director of
Claims Training
Mercury Insurance

Teresa Ramos bears virtually no resemblance to British actor Rex Harrison.

But the director of claims training at Mercury Insurance lights up like Professor Henry Higgins in the film version of *My Fair Lady* when students in her class suddenly grasp the importance of customer service.

“It’s like watching a light bulb go on in each student’s head when they realize the role of a true claims professional

in the overall success of an insurance company,” said Ramos. “These people are responsible for insurance from the bottom up, and it’s up to each one of them to make the policyholder feel like their claim is the one and only thing on our plate. And that’s not always easy.”

Ramos coordinates three Mercury Insurance training sites in California. She is given eight weeks with new employees to teach them how claims can be the measuring stick by which all insurance companies are measured.

“Each new employee is like a baby. We need to teach them how to crawl before they can walk out into the real world,” described Ramos. “And it is my responsibility to give them the knowledge and

tools to do that.”

Judging by Mercury’s 95 percent California renewal rate, Ramos’s trainees have not only gotten the message, but they and other Mercury claims professionals have had a big impact on customer satisfaction.

“We take great pride in Mercury’s claims service,” says Ramos. “It is always our goal to surpass policyholder expectations and address all claims quickly and efficiently.”

Ramos, the mother of three girls, has been with Mercury since 1989 when she accepted an offer to become a claim adjuster after her graduation from Cal State Long Beach. She has been respon-