Course Identification

Practical Skills for Insurance Professionals: Statement Taking

Alberta Accreditation Committee Course ID # 59079

Continuing Education Credit Hours: 2 Hours

Class of Certificate: Insurance Adjuster

Course Description

This seminar provides participants with an advanced study of statement taking with special focus on preparation techniques and strategies. Information and discussion will improve the participant’s understanding of the purpose and challenges of statement taking.

Topics discussed support learners practical application of best practices in taking statements. Learners explore and discuss the types of questions asked in an interview, a sample statement taking approach, and the special considerations in taking statements from witnesses and minors.

Course Schedule

Lesson 1 Preparation Techniques 30 minutes

Lesson 2 Taking a Statement 90 minutes

## Course Outline

## **Lesson 1:** **Preparation Techniques**

*Learning Outcomes*

1. *Explain the purpose and challenges of taking a statement.*
2. *Describe the steps in preparing to take a statement.*

Topics Covered

1. Purpose
2. Challenges
3. Preparing to Take a Statement

# **Lesson 2: Taking a Statement**

*Learning Outcomes*

1. *Identify and explain the types of questions that are commonly used in taking a statement.*
2. *Identify and explore the steps in a sample statement taking approach.*
3. *Identify and describe the special considerations in taking statements from witnesses and minors.*

Topics Covered

1. The Questioning Process
2. Types of Questions (5)
3. Questioning Challenges (3)
4. Sample Statement Taking Approach
5. Taking Statements from Witnesses
6. Taking Statements from Minors