



EASILY CUSTOMIZED FOR YOUR AGENCY

- General Agency Procedures
- Commercial Lines Procedures
- Personal Lines Procedures
- Employee Benefits Procedures
- Job Descriptions



After years of trying to write a manual for your office, you can now buy a complete manual and with very little time and effort customize it to fit your agency using basic word processing skills. Whether processing a non-premium endorsement, or the most complex reporting form policy, the easy to follow workflow make the process simple. Provided on USB Drive for ease of editing, this manual is ideal for training new employees, reinforcing procedures to existing employees, and to meet the requirements of the "Rules of Evidence."

THIS COMPLETE MANUAL INCLUDES:

General Agency Procedures

- Automation Policy
- Binding Procedures
- Mail Handling Procedures
- Claims Processing Procedures
- E&O Risk Management Procedures
- E&S/Residual Marketing Procedures
- Telephone & Fax Procedures
- E-Mail & Internet Procedures

Personal Lines Work Flow & Procedures

- Quotation Procedures
- New Business Procedures
- Renewal Procedures
- Endorsement Procedures
- Cancellation Procedures

Job Descriptions

- Agency Manager
- Producer
- Marketing Manager
- Customer Service Representative
- CSR Assistant/Processor

Commercial Lines Work Flow & Procedures

- Lead Development
- Quotation Procedures
- New Business Procedures
- Renewal Procedures
- Endorsement Procedures
- Cancellation Procedures

Employee Benefits Procedures

- Prospecting
- Quotation Procedures
- New Business Procedures
- Renewal Procedures
- Individual Life & Health Procedures

GET STARTED TODAY!

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YOUR AGENCY WITH
CUSTOMIZATION. CALL OR
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