Trophy Club Consulting

SFConnect Usage: Copy text template to use for SFConnect and paste into Task or Log in ECRM-this will prevent having to check SFConnect for prior correspondence

Email Usage: Follow same procedure-Use texting templates for email content

Note: New Business Documents and Cancellations within 12 months of business written goes back to TM that wrote business (add to weekly spreadsheet)

Activities	
Task	***Description***
ECRM Cases	• Review for claims BOD • Call customer, Email claim template • Report to the team
Internet Change Requests for Fire	• Complete changes as requested • Copy and paste into ECRM with actions taken or needed • Text #1, schedule 4R if applicable
Internet Change Requests for Auto	• Complete changes as requested • Copy and paste into ECRM with actions taken or needed • Text #1, schedule 4R if applicable
Address Changes	• If HH has duplicate address, text #10 to verify correct address • Complete renters re-write • Complete address change in NECHO on all accounts as needed
Home Surveys (updated ERC)	• Text #3 • Schedule Simple Conversation • Run ERC tool • Submit remarks and attach ERC via NECHO
Home Renewals (Repairs Needed)	• Text # 3 • Submit requested info via NECHO
Commercial Audit Letter Workers Compensation Audit	• Text #4 • Schedule Simple Conversation
Mortgagee Cancellation Notice/Mortgage Payoff	• If new business, Assign to TM that wrote • If renewal, text #3, Call, Email

Activities	
Task	***Description***
Documents Needed—Recurring Monthly Authorization Form	**IF NEW BUSINESS, ASSIGN TO TM THAT WROTE** **IF CHANGE, ASSIGN TO TM THAT MADE CHANGE** • Text #5 • Use SFPP hyperlink to send Email • If no texting preference, Call • **Word Track**: "I wanted to let you know that the monthly authorization form required to draft your account each month has not been received. I just sent the form to your email. Please complete it at your earliest convenience. Thank you for choosing _____ ! • Document in ECRM
Policy Documents Needed: Alarm Cert, Selection/Rejection Form, Expired License, Mileage Request, etc.	• Home Alert-Text #16, Document ECRM • Selection/Rejection Form-Text #17, Document ECRM • Expired License-Text #18, Document ECRM • Submit update
Assigned Driver Request	• Text #14 if info needed • Submit update
Home/Auto Discount Removed	• Research why discount was removed • Document in ECRM • Add back if needed • Text #2 to schedule an appointment if necessary
MLD Removed	• Research why discount was removed • Document in ECRM • Add back if needed • Text #2 to schedule an appointment to if necessary
Premium Increase of $10/month +	• Copy task into Account Note in ECRM, set Alert ("4R premium increase")

	• Text #2
Negative Star Level Change	• Copy task into Account Note in ECRM, set Alert ("4R premium increase") • Text #2
Premium Decrease of $10/month + Standard to Mutual Offer Positive Star Level Change	• Assign to Hybrid/CCR 2 • Hybrid/CCR 2 will Call Day 1, if NA, LM, Send Text #20 • Day 2, Call, if NA,LM, and Complete • **Word Track:** "XXXXX, Please contact us about available discounts on your insurance at ________. Thank you for choosing_______!"
Persistency Alarm (Life) /Late Payment Offer (Life)/ Policy Lapse Notification ****NOT POLICIES ON SFPP****	• Persistency Alarm: pend to 3 days prior to lapse notification • Lapse notification: Call/Text #7/Email • Document ECRM
Life Reinstatement App Needed	• Assign to Account Rep 1
GIO	• Assign to Account Rep 1
Good Student Recertification	• Text #8
OSOEZ folders-New Business	• Copy and paste notice into ECRM task • Assign to appropriate TM
OSOEZ folders-Existing Business	▪ Copy and paste notice into ECRM task ▪ Company Cancellations/Non-renewals – assign to Hybrid/CCR 1 ▪ Report in weekly team meeting
Late Payment **Fire policy app date-30 days after cancellation** **Business policy app date—16 days after cancellation**	• ****If SFPP and no preferences set, create Account note with Alert ("Update texting/emailing preferences")**** • First day: Pend out 3 days prior to cancellation. • 3 days prior to cancellation: **<u>Check to see if payment has been made</u>** (NECHO, ECRM) • Text #9 • If no texting preference, Call, leave message if no answer. Email. Then pend out 1 day prior to App date. • **Word track** if you get them on the phone: "We received a notice that State Farm hasn't received your premium yet so we were reaching out to help you take care of that today." • **Word track** if no answer: "This is an urgent notice for xxxxx, please call our office as soon as possible regarding your insurance at _________." • 1 day prior to App date: **<u>Check to see if payment has been made</u>** • Same process
Mortgagee Warning	• Mark Complete
Life Late Pay Offer- Spanish Speaking Customer	• Assign to Hybrid/CCR 2
Bank info/Credit Card info needed	• Text #13 • Document ECRM
Fire Warning/Past Due Bills	• Mark Complete (Will work as late pay process when cancellation notice is sent)
Company Cancellations/Non-renewals	• Assign to Hybrid/CCR 1 • Report in weekly team meeting
Returned Mail	• Text #10 • Call if no texting preference
PLUP/CLUP Renewal questionnaires	• Text #11 • Call if no texting preference • Copy and paste request in ECRM with notes as to what actions were taken • Collect information from client and submit via NECHO
Vehicle Status Update	• Text #12 • Document in ECRM
Earned Premium Notice	• Mark Complete
G4521/Customer Initiated Assignments	• Assign to Hybrid/CCR 1 • Report in weekly team weekly
ERS Tow notification	• Mark Complete
E-signature Needed	• Assign to sales person that wrote
E-signature Completed	• Mark Complete
Policies Issued Higher	• Assign to writing TM or TM that made changes • Email Account Rep 1
Audit Premium Adjustments	• Text #4 • Schedule Simple Conversation • Document ECRM
Underwriting Caution Memos	• Text #12 • If option to send letter from SF, choose option to send from regional office • If no texting preference, Call • **Word Track**: "Our underwriting department reached out and needs to verify your relation to _______, who was the driver in the claim on 08/05/19, and if they need to be listed as a regular driver on your policy?"

	• If NOT a household member, send through a NECHO change explaining the person's relation to the insured and that they are not in the HH, it was a one-time thing • Document ECRM with alert on account page ("See caution memo")
Open Service Tasks—After-hours	• Service Related (CCC requests, Internet change requests/quotes, customer needing call back, etc.) • Mark Complete • Text #12 if information needed • Call/Email
Marketing Lists	• Assign to Account Rep 1
Open Sales Tasks—After-hours	• Assign to Account Rep 1
Email Address Needed	• Text #19 • Document ECRM
BOD Policies Issued and Mailed	• Assign to TM that wrote original policy • If renewal, Mark Complete
Dwelling Under Construction	• Assign to TM that wrote original policy

All of these tasks will be found in ECRM **>** TASKS**>** "Open Service Tasks" or ECRM **>**Cases**>**"Action Needed Cases"
OSOEZ Folders are in Outlook

Templates

*****Copy text template for SFConnect and copy into Activity Log in ECRM for all Transactions*****

#1—Urgent! Please contact our office about your recent service request. Please call ______. Thanks for choosing __________!

#2—Urgent! Please contact our office to review your accounts. Please call _______. Thanks for choosing _______!

#3—Urgent! We need updated information on your Homeowners policy. Please call _______. Thanks for choosing __________!

#4—Urgent! Please contact our office regarding your Business insurance policy. Please call _______. Thanks for choosing _________!

#5—Urgent! Please check your email for State Farm forms that require your electronic signature. Thanks for choosing _________!

#6—Urgent! Odometer reading required to maintain your Drive Safe & Save Discount. Text ________. Thanks for choosing ________!

#7—Urgent! Payment needed on your life policy to maintain coverage. Please call ________. Thanks for choosing __________!

#8—Urgent! It is time to verify that XXXXX still has a 3.0 GPA or above for the good student discount. Please respond to this text or email a current transcript to _________. Thanks for choosing _________!

#9—Urgent! Friendly reminder that your insurance payment is due. Please use the quick link @ https://st8.fm/Pay or call your State Farm Agent _________ at ________. Thanks for choosing _________!

#10—Urgent! Please confirm your current address for our records. Thanks for choosing _________

#11—Urgent! We need updated information for your Umbrella policy renewal. Please call ______ Thanks for choosing ________!

#12—Urgent! Please contact our office regarding your insurance policy. Please call _______. Thanks for choosing ________!

#13—Urgent! We need to update the bank account or card used for your State Farm monthly payment plan. Please call _________ or go online to _________ to update. Thanks for choosing ________!

#14—Urgent! Updated driver information needed for your auto policy. Please call ________. Thanks for choosing ________!

#15—Urgent! Odometer reading needed on your XXXXX to maintain your low mileage discount. Thanks for choosing ________!

#16—Urgent! Please email or fax your current Home Alert Certificate to maintain your discount on your homeowners. Email ________ or our fax number is ________. Thanks for choosing ________!

#17—Urgent! A signed Selection/Rejection form is needed for your Auto policy. Please check your email. Thanks for choosing ________!

#18—Urgent! Updated Driver's License info needed for XXXXX. Please call ______. Thanks for choosing _______!

#19—Urgent! Please send us your updated email address to assist with servicing your accounts. Thanks for choosing _______

#20—XXXXX, Please contact us about available discounts on your insurance at _________. Thank you for choosing _________!