

For Trophy Club Legacy and MOA offices**

Voicemail ID- 1-434-xxx-xxxx

Voicemail Password- xxx-xxxx



SFConnect Usage: Copy text template to use for SFConnect and paste into Task or Log in ECRM/Archive in SFConnect-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
Internet Change Requests for Auto	<ul style="list-style-type: none"> Assign to CSR1
Internet Change Requests for Fire	<ul style="list-style-type: none"> Assign to CSR1
Address Changes	<ul style="list-style-type: none"> Assign to CSR1
Assigned Driver Request	<ul style="list-style-type: none"> Text #14 if info needed Mark Complete
Home Surveys	<ul style="list-style-type: none"> Assign to CSR1
Dwelling Under Construction	<ul style="list-style-type: none"> Assign to TM that wrote original policy
Home Renewals (updated ERC or Repairs Needed)	<ul style="list-style-type: none"> Assign to CSR1
Commercial Audit Letter	<ul style="list-style-type: none"> Assign to CSR1
Workers Compensation Audit	
Documents Needed—Recurring Monthly Authorization Form	<p>**IF NEW BUSINESS, ASSIGN TO TM THAT WROTE** **IF CHANGE, ASSIGN TO TM THAT MADE CHANGE**</p> <ul style="list-style-type: none"> 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 [Agency Name] State Farm!" Document in ECRM
Policy Documents Needed: Alarm Cert, Selection, Expired License, Mileage Request, etc.	<ul style="list-style-type: none"> Home Alert-Text #16, Document ECRM Expired License-Text #18, Document ECRM
Home/Auto Discount Removed	<ul style="list-style-type: none"> Research to see why discount was removed Document in ECRM If resolved, Mark Complete Assign to CSR1 to add back if needed
MLD Removed	<ul style="list-style-type: none"> Research why discount was removed Document in ECRM Add back if needed Text #2 to schedule an appointment if necessary
Premium Increase of \$10/month +	<ul style="list-style-type: none"> Copy task into Account Note in ECRM, set Alert ("4R premium increase") Text #2
Negative Star Level Change	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Assign to CSR2 CSR2 will Call Day 1, if NA, LM, Sent Text #20 Day 2, Call, if NA, LM, and Complete Word Track: "[Customer First Name], please contact us about available discounts on your insurance at 434-XXX-XXXX. Thank you for choosing [Agency Name] State Farm!"
Persistency Alarm (Life) /Late Payment Offer (Life)/ Policy Lapse Notification **NOT POLICIES ON SFPP**	<ul style="list-style-type: none"> Persistency Alarm: pend to 3 days prior to lapse notification Lapse notification: Call/Text #7/Email Document ECRM
Life Reinstatement App Needed	<ul style="list-style-type: none"> Assign to Account Rep 1
GIO	<ul style="list-style-type: none"> Assign to Account Rep 1
Good Student Recertification	<ul style="list-style-type: none"> Text #8
OSOEZ folders-New Business	<ul style="list-style-type: none"> Copy and paste notice into ECRM task and assign to appropriate TM

<p>Late Payment</p> <p>**Fire policy app date-30 days after cancellation**</p> <p>**Business policy app date—16 days after cancellation**</p>	<ul style="list-style-type: none"> • **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 [Name] please call our office as soon as possible regarding your insurance at 434-xxx-xxxx” • 1 day prior to App date: <u>Check to see if payment has been made.</u> • Same process. • If policy has been written within the last 12 months reassign back to the producer • Send Office Manager list of policies that cancelled within 12months of written date to Office Manager on Friday
Mortgagee Warning	<ul style="list-style-type: none"> • Mark Complete
Mortgagee Cancellation Notice/Mortgage Payoff	<ul style="list-style-type: none"> • If new business, Assign to TM that wrote • If renewal, assign to CSR1
Life Late Pay Offer- Spanish Speaking Customer	<ul style="list-style-type: none"> • Assign to CSR2
Bank info/Credit Card info needed	<ul style="list-style-type: none"> • Text #13 • Document ECRM
Fire Warning/Past Due Bills	<ul style="list-style-type: none"> • Mark Complete (Will work as late pay process when cancellation notice is sent)
Company Cancellations/Non-renewals	<ul style="list-style-type: none"> • Assign to CSR1
Returned Mail	<ul style="list-style-type: none"> • Text #10 • If no texting preference, assign to CSR1
PLUP/CLUP Renewal questionnaires	<ul style="list-style-type: none"> • Text #11 • If no texting preference, assign to CSR1 • Copy and paste request in ECRM with notes
Vehicle Status Update	<ul style="list-style-type: none"> • Text #12 • Document in ECRM
Earned Premium Notice	<ul style="list-style-type: none"> • Mark Complete
G4521/Customer Initiated Assignments	<ul style="list-style-type: none"> • Assign to CSR1
ERS Tow notification	<ul style="list-style-type: none"> • Mark Complete
E-signature Needed	<ul style="list-style-type: none"> • Assign to TM that wrote
E-signature Completed	<ul style="list-style-type: none"> • Mark Complete
Policies Issued higher	<ul style="list-style-type: none"> • Assign to writing TM or TM that made change – make sure sales fixes it and email Agent
Audit Premium Adjustments	<ul style="list-style-type: none"> • Text #4 • Document ECRM
Underwriting Caution Memos	<ul style="list-style-type: none"> • Text #12 • If option to send letter from SF, choose option to send from regional office • If no texting preference, assign to CSR1 • Document ECRM with alert on account page (“See caution memo”)
Open Service Tasks—After-hours	<ul style="list-style-type: none"> • Service Related (CCC requests, Internet change requests/quotes, customer needing call back, etc) • Assign to CSR1
Marketing Lists	<ul style="list-style-type: none"> • Assign to Office Manager
Open Sales Tasks—After-hours	<ul style="list-style-type: none"> • Assign to Office Manager
Email Address Needed	<ul style="list-style-type: none"> • Text #19 • Document ECRM
BOD Policies Issued and Mailed	<ul style="list-style-type: none"> • Assign to TM that wrote original policy • If renewal, complete

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/Archive text in SFConnect****

#1—Urgent! Please contact our office about your recent service request. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#2—Urgent! Please contact our office to review your accounts. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#3—Urgent! We need updated information on your Homeowners policy. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#4—Urgent! Please contact our office regarding your Business insurance policy. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

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

#6—Urgent! Odometer reading required to maintain your Drive Safe & Save Discount. Text 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#7—Urgent! Payment needed on your life policy to maintain coverage. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#8—Urgent! It is time to verify that [student name] still has a 3.0 GPA or above for the good student discount. Please respond to this text or email a current transcript to agent@agentdomain.com. Thanks for choosing [Agency Name] State Farm!

#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 [Agency Name] @ 434-XXX-XXXX, 24/7 @ 800- XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#10—Urgent! Please confirm your current address for our records. Thanks for choosing [Agency Name] State Farm!

#11—Urgent! We need updated information for your Umbrella policy renewal. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#12—Urgent! Please contact our office regarding your insurance policy. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#13—Urgent! We need to update the bank account or card used for your State Farm monthly payment plan. Please call 434-XXX-XXXX or go online to www.agentdomain.com to update. Thanks for choosing [Agency Name] State Farm!

#14—Urgent! Updated driver information needed for your auto policy. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#15—Urgent! Odometer reading needed on your [VEHICLE] to maintain your low mileage discount. Thanks for choosing [Agency Name] State Farm!

#16—Urgent! Please email or fax your current Home Alert Certificate to maintain your discount on your homeowners. Email agent@agentdomain.com or our fax number is 434-293-8342. Thanks for choosing [Agency Name] State Farm!

#17—Urgent! A signed Selection/Rejection form is needed for your Auto policy. Please check your email. Thanks for choosing [Agency Name] State Farm!

#18—Urgent! Updated Driver's License info needed for [NAME]. Please call 434-XXX-XXXX. Thanks for choosing [Agency Name] State Farm!

#19—Urgent! Please send us your updated email address to assist with servicing your accounts. Thanks for choosing [Agency Name] State Farm!

#20—[NAME], Please contact us about available discounts on your insurance at 434-XXX-XXXX. Thank you for choosing [Agency Name] State Farm!