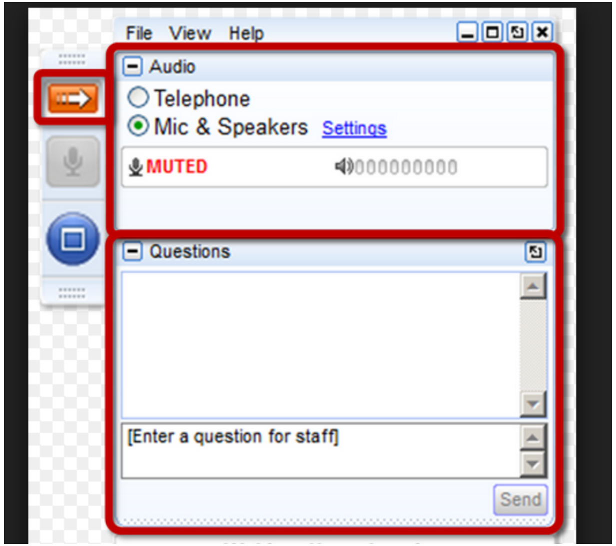
Deliver Effective Customer Service with Applied CSR24 Part 2

Presenters: Theresa Clayton, Becky Lehpamer of RiskSOURCE Clark-Theders

A few things to keep in mind before we get started!

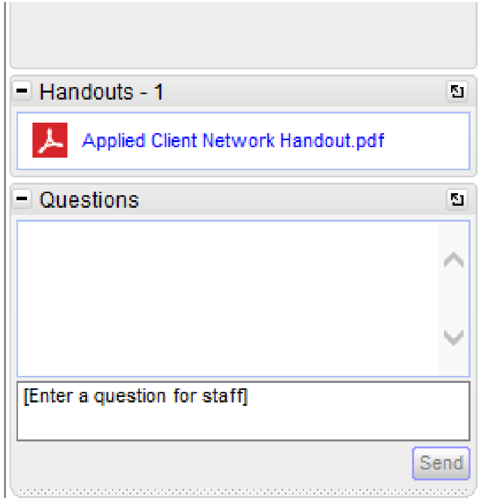
- You can use your speakers or your headset to hear the presenter.
- However, you will have no speaking abilities yourself. If you have a question, simply type it into the "Questions" section of your control panel and click send.



APPLIED Client Network

Handouts

- Any handouts can be accessed through the **Handouts** section of the control panel.
- Any handouts for this session will be sent as a PDF linked within the webinar thank you email.



APPLIED Client Network


APPLIED | NET
SEPTEMBER 25–28, MGM GRAND LAS VEGAS
BE A PART OF
THE DIGITAL TRANSFORMATION OF INSURANCE

You're invited to Applied Net 2017.

Join more than 3,000 of your peers to learn about the opportunities created by the digital transformation of insurance.

ATTEND APPLIED NET 2017 ALONGSIDE FELLOW AGENTS, BROKERS, INSURERS AND SOLUTION PROVIDERS, TO:

> Gain software and industry knowledge in more than 200 classes and workshops focused specifically on opportunities unique to your business
> Discover the innovation transforming the industry and enabling your digital business
> Experience one-of-a-kind keynotes to inspire and inform you on the future of the industry
> Take advantage of networking opportunities to gain industry insights and share best practices among peers

Register now and save at appliednet.com

APPLIED | NET

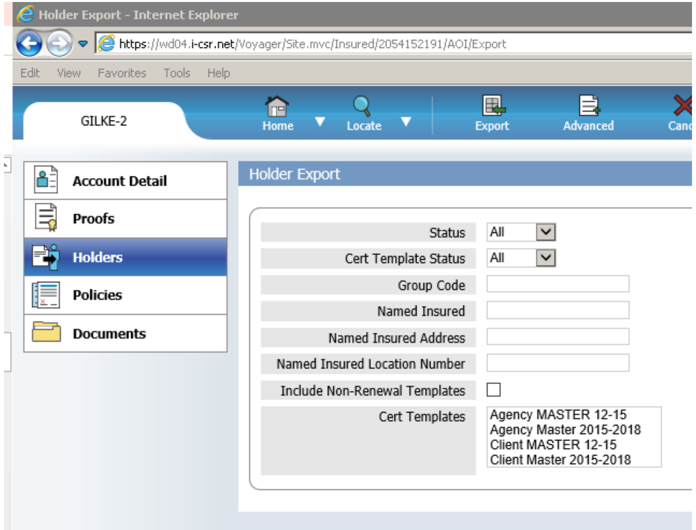
SEPTEMBER 25–28, MGM GRAND LAS VEGAS

Deliver Effective Customer Service with Applied CSR24

- AGENDA
  - Pre-Renewal Phase
  - Renewal Phase
  - Electronic Delivery of Documents (eDOC) / Processing

Pre-Renewal Phase

- Pre-Renewal Phase: We export the certificate holder list from CSR24 to Excel.
  - Include: Certificate holder name, address and certificate description.



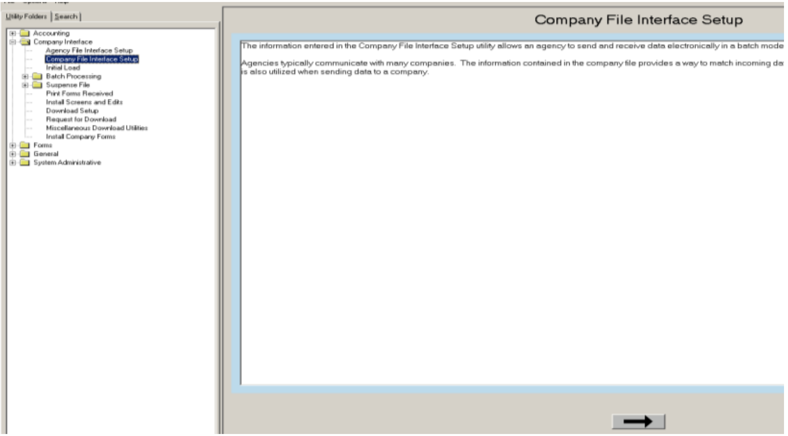
Renewal Phase

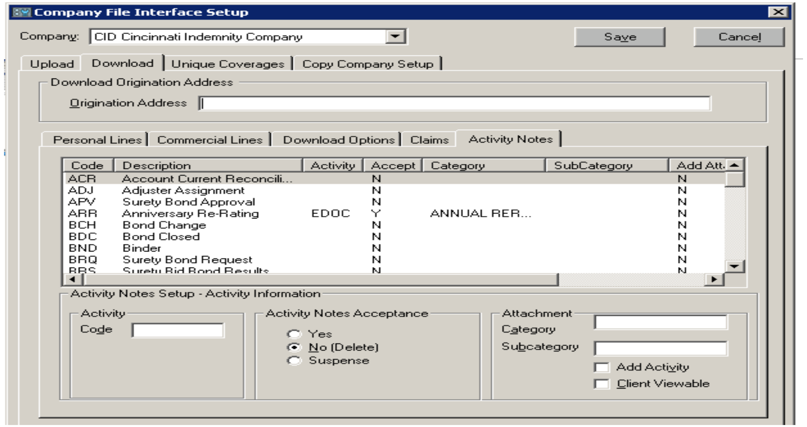
- Check to see if client is user on CSR24
  - If yes, review with client the current contacts in Applied for any changes.
  - If no, set up with user id/password
- Once renewal is ordered from the carrier;
  - Move current applications to history; move future applications to current.
  - Update the policy dates and policy numbers for the new term.
- Certificates
  - Update certificate template with correct renewal dates and policy numbers. These update nightly from TAM/EPIC database into CSR24.
  - Once certificate template updates certificates can be issued.

APPLIED Client Network

eDOC Setup

- Set up eDOC downloads with carrier
- Complete company interface setup in Applied





Receiving eDOCs

- Documents are received via activity notes through download.
- We have a dedicated person who monitors the download;
  - > Documents either go into the suspense file or automatically attach to the client.
  - > Attachment description is modified to a consistent method.

What	TAM Category	Description Format
Renewal	Policies	Renewal (yr/s): Type (Pkg, WC, D&O)
Endorsement	Policy Changes	ENDT# : When/What
Audit Assignment /Audit Not Needed	Audits	Audit (Audit Period): Audit Assigned or Not Needed
Contracts	Contracts	3rd Party/Job Name & Contract #
Leases	Leases	Enter location address
Financials	Financials	In-House or CPA (yr) Financials
Bonds	Bonds	New = Description REN – Bond # & Date
Spreadsheet	Policy Summary	Policy Summary (yr) Renl Comparison (yr) Prem. Alloc. Spreadsheet -
Statement of Values	SOV	Eff Date (when signed)
Cancellation	Cancellation	Cancellation (Eff. Date): Type (Pkg, WC, D&O)
Re-Rates	Annual Rerate	Policy Period Date rerate covers
New Business	Policies	New Business (yr/s): Type of policy
Reinstatements	Policies	Reinstatement – Effective Date
Rewrites/Re-issues	Policies	Rewrite – Effective Date

APPLIED Client Network

Processing eDOCs

- eDOC assignment to CSR
  - When eDOC is received, an eDOC activity is generated. The eDOC activity is reassigned to the Account Manager (AM) or Client Relation Manager (CRM) for processing.
- eDOC activity alerts AM or CRM that document has downloaded/attached and is ready for processing.
  - eDOC activity is closed once AM/CRM processes it.
  - Verify document to client application in Applied for accuracy then close CHGR or RENO activity.
  - Invoice

Delivering eDOCs

- Outlook templates are used for delivery. We have created one for renewals, endorsements, rerates, etc.
- Up until the renewal, the client is sent a copy of the eDOC and invoice as well as their portal information via email.
- We explain that going forward all future renewals/changes will be available to them through their portal.
- Once transitioned to portal we note their account one of two ways(we use user field 2 on the client detail screen):
  - CS (CSR24 – Certificates Only)
  - CP (Client Portal – All)

Applied Client Network 2017 Webinars

Webinars are available for on demand viewing shortly after the live broadcast.

Visit ***www.AppliedClientNetwork.org***
Select "Education"
Select "My Webinars"

Stay Connected.

Log into

www.appliedclientnetwork.org

to keep your agency and your contact information up to date.

APPLIED Client Network

Applied Client Network can be reached at:

info@appliedclientnetwork.org

800-383-2952

www.appliedclientnetwork.org

APPLIED
Client Network

Special Thanks to our Principal Partner

APPLIED

APPLIED Client Network