



## **Granite's Commitment to Customer Service**

### **Phone Calls**

- Retrieve voice mail(s) upon receipt and return call within 1 hour (only exception would be if the phone call is received after 4:30 pm)
- Be Polite and Courteous and express Respect when speaking to a customer
- Always end your phone conversation with “is there anything else I can do for you?” – even if it is not your client
- If we are working on a service item for a client which requires a return phone call, we will call the client with status as needed until we have the answer
- Always helping the clients with a “can-do” attitude
- Update voice mail when out with contact person for back-up and disclaimer “coverage cannot be changed or issued without written confirmation from our office.”
- Person answering the phone will screen your call and tell you who is calling and where the call is –please take the call

### **E-mail**

- Responding to e-mails as they come into Outlook. If we do not have the answer, we respond to the e-mail advising the client we are working on their request. Provide them with a reasonable time frame for a response to their question
- If you are the recipient of an email and delegating the email to another co-worker for handling, you are to respond to the email and copy the person delegating to advising we have received the email and who is responsible to handle. Example = Thank you for your email. Renee will review your request and be in touch shortly.
- Update the subject line of your email with the “actual” subject of the email (this is especially important when you are forwarding)
- Make sure e-mails are proof-read
- Spell check
- CC to all required parties
- Signatures are uniformed – using signatures saved on e:drive/Workflows All Departments/Email Signatures

- Turn out-of-office on when out with contact info for back-up – add disclaimer “coverage cannot be changed or issued without written confirmation from our office.”

### **Day-to-Day Tasks**

- CL – Certificates processed within 24 hours by Patra (certrequest@graniteins.com) – Urgent certs will be issued by CSR immediately
- Reviewing all open activities daily and taking action on each of them
- Processing a change request within 24 hours of receipt from the client
- Once an change request is processed, send e-mail confirmation advising what changes have been done and time frame for when they can expect the endorsement
- CL - Send auto ID cards same day a change request is processed to add a new vehicle, new business and renewal business
- CL - Run MVR's for a new driver request or on a client request (advise if driver is acceptable – do not send to client unless you have a signed release from the driver)
- Produced Accounts – provide Producer with pre-renewal summaries and any other apps or supps, 90-120 days out for updates on renewals
- Benefits – Process Employee Adds/Deletes same day and provide written confirmation to insured
- Benefits – quotes completed within 24 hours of request from Producer
- Process policies within 5 business days of receipt from carrier. Policies can also be sent to Patra for checking at [ginpolicychecking@patracorp.net](mailto:ginpolicychecking@patracorp.net)
- Reduction or elimination of coverage requires written request from insured

### **Cancellations**

- Add NOC in EPIC with open activity to follow up 2 days prior to NOC with carrier for payment received, if no reinstatement is received prior to follow up
- Email NOC to insured and cc Producer, if applicable
- Close activity if reinstatement received and no further action and activity reinstatement
- If no reinstatement received, resend NOC email to insured to advise them to make payment or policy will cancel. CC Producer, if applicable
- Follow up day of cancellation and if no payment received by carrier, advise insured via email policy cancelled for non-pay, Notify Producer, if applicable and process cancellation workflow in EPIC

### **Non-Renewals**

- Contact client by phone, followed up by e-mail the day agency is notified of a non-renewal. Client contact must occur prior to client getting direct notice, whenever possible
- Producer or payroll rep must be notified of the situation at the same time the client is contacted
- Make arrangements with client to lift non-renewal or re-market account
- Replace account or lift non-renewal 7-14 days prior to renewal date, if possible.
- Notify all involved parties accordingly.