

## Granite Communication Standards – Sales/Production

### **1. Daily Communication via phone, email or text, EPIC Documentation**

- Please respond to emails and text messages within 15 minutes, if you're not in a meeting. Preferably, texts should be responded to upon receipt, and emails within 15 minutes.
- Phone calls should be returned same day (and documented in EPIC) unless you get the call after 4:30 pm PST. If a call is received after 4:30 PST, call should be returned by 9 am PST the next business day. If a phone call is received after 4:30 PST, an email confirming the phone call should be sent same day, stating you be back to them in the morning if you can't return the call that evening.

### **2. Servicing of Accounts/AE Client Meetings/EPIC Documentation**

- All day-to-day servicing of accounts must be done by the Client Manager assigned to the account.
- If a service request is received by you from one of your clients, you respond to the email stating "Thank you for your email. Your Client Manager, will review your request and be in touch shortly." Copy the appropriate Client Manager on your reply or the appropriate d-list (example [policies@gocomp.com](mailto:policies@gocomp.com)).
- If the client has a general question about insurance or other generalities that you may be able to answer, it is ok for you to respond. If you respond, the response MUST be attached in EPIC, along with all other communication. Code accordingly, along with full description of conversation in system.
- Benefits Only: Mid-term client meetings/stewardships will be set and attended by AE. This will automatically occur 6 months post new/renewal date, unless otherwise noted. Everything will be documented in EPIC and you will be updated with meeting results.

### **3. Schedule/Meetings**

- If there is a team meeting, please show up
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- You'll be expected to be in the Office (or work remotely via go-to-meetings) on your designated in office day. You'll have all of your one-on-one's and department meetings on that day, unless there is an exception. If for some reason you are not coming in, please let your manager know prior to the meeting.

### **4. New Business Submissions (Applies to Benefits & CL)**

- All new submission must be submitted through Stacilynn or Renee for review and assignment of Client Manager. That includes paper files, completed onboarding, invoices, documents and misc communications not in EPIC. All prospect/client communication needs to be attached in EPIC, and calls documented.
- All BofR's must be submitted to Stacilynn or Renee for assignment of Client Manager with the appropriate paperwork.
- All processing and handling of the BofR/submission is done by the Client Manager

### **5. Renewals**

- You are responsible to gather data and submit appropriate renewal information to your Client Managers timely.
- Your renewals will be processed by your Team, but you are welcome to join any renewal meetings.
- Client Managers and Advisors handle all renewal processing. Files are made for each and every renewal, and then documented in EPIC. Producer may or may not be responsible for handling the renewal with the client, depending on the Client and Producers request.

### **6. Documentation in EPIC**

- Everything (phone calls, email correspondence, etc.) needs to be attached and documented in EPIC, when the communication occurs or shortly after. 24 hours is the max post attachment timeline that your team needs you to follow.

**7. Your Inbox**

- You in-box needs to be kept up to date, and not used as a storage bin for your open activities. Anything that needs to be saved, attach to the client or company in EPIC. If you want a copy, set up a folder within your inbox. All e-mails attached into EPIC or HS, whichever system applies at the time of communication.

**Reviewed, Understood and Agreed by:** \_\_\_\_\_

Date: \_\_\_\_\_ Witnessed by: \_\_\_\_\_