

Customer Interaction Confirmation Guidelines

All customer interaction will be confirmed with the customer according to the following guidelines.

New Coverage – Confirm (briefly):

- Effective date
- What is to be covered
- Coverage amounts
- Any lienholders
- Actions required by customer
- Information needed
- Anything the customer should expect (inspections, premium drafts, etc.)

Changes – Confirm (briefly):

- What was removed
- What was added
- Changes in amount of coverage
- Effective date(s) (of each if applicable)
- Information needed
- Anything the customer should expect (premium notices, etc.)

Coverage (or policy) cancellation -

- Confirmation of request

All communication should include verbiage to “Please see insurance company communication for details”.

All communication should include a request to confirm receipt of communication.

All communication should be through, or attached to, the agency management system.

Communication can be via e-mail, text, fax or US Mail.

An actual signature should be secured when required by insurance company. This can be sent to us on a letter or Accord form. As long as acceptable to the insurance company, it can be sent to us via e-mail, picture texted, fax, US Mail or delivered to any office location.