Commercial Lines-A Renewal Process

INSURANCE REVOPS

45 → 30 → 15 → 0 → + ★

Client Communication

1. Automated Email to Client "Your Renewal is Approaching has anything changed?"

2nd Client Communication and E&S

1. Bundle and Save Email.
2. Confirm and finalize Applications (E&S).

Confirmation and Documentation

1. Confirm payment if E&S.
2. Confirm signed docs on cross sold policies.
3. Prepare Renewal Certificates

Renewal!

1. Email "Thank you for Renewing" and Asking for Referral.
2. Send all COIs on file

Post Renewal

1. Three days post renewal- Confirm downloads and update policy status.
2. Send email asking for Testimonial or Social Review.