

Service Standards & Expectations

Service Standards

Updated: M/D/Year By:{NAME}

Overview {Include Your Own – this is a sample from our agency}

{Insert Agency Name} is founded on exceeding clients' expectations at every interaction. In order to ensure our clients always receive above average service from us it is imperative that our service standards are ALWAYS followed.

If you are unable to meet any of the standards listed below you are responsible for immediately notifying the manager that is currently on-duty in the agency as soon as you realize you are overloaded. The manager will assist you with time management and help to ensure standards are met by asking other team members for help etc. . . .

Standards & Expectations Applies to ALL {Insert Agency Name} relationships

You are expected to ...

1. Return all telephone calls **during the same business day.**
2. Claims confirmations
 - a. (Loss notice) will be forwarded to carrier within **15 minutes** of notification.
 - b. If notification to agency is made by a carrier client will be called **during the same business day** notification is received.
 - c. Claim payments turned into the Agency will be processed and released within **2 business days** of receipt of all necessary information.
 - d. Any client with 3 or more claims in a 3-year period or 1 claim with a loss reserve of \$20,000 or more should be **addressed with management immediately.**
3. Respond to all emails and any other correspondence not specifically addressed in this document **during the same business day.**
4. Activities marked as URGENT will be completed **during the same business day.**
5. **30 Open Activities** in management system at the end of a business day; **you must notify your manager.**
6. All payments will be deposited and accompany proper documentation **during the same business day** of receipt.

7. Second requested items to be processed and released within **1 business day** notification.

Personal Lines:

1. New business acceptance and quotes will be released within **24 hours** of receiving issuance instructions.
2. Endorsement requests with carriers you have binding authority will be processed and released within **24 hours** of request.
3. Endorsement requests with carriers you DO NOT have binding authority will be processed **prior to the effective date** or the date effective.
4. New Business with carriers you have binding authority with will be forwarded to carrier within **48 hours** of effective date.
5. New Business with carriers you DO NOT have binding authority with will be forwarded to carrier **prior to the effective date** or the date effective.

Commercial Lines and Life:

6. New business acceptance and quotes will be released within **48 hours or the agreed upon date that is documented in the file** of receiving issuance instructions.
7. Endorsement requests with carriers you have binding authority will be processed and released within **24 hours** of request.
8. Endorsement requests with carriers you DO NOT have binding authority will be processed **prior to the effective date** or the date effective.
9. New Business with carriers you have binding authority with will be forwarded to carrier within **48 hours** of effective date.
10. New Business with carriers you DO NOT have binding authority with will be forwarded to carrier **prior to the effective date** or the date effective.
11. Certificates of Insurance will be **issued within 1 business day** of receipt of request.

Other Items:

1. All items in individual mail boxes will be processed **within 48 hours**. Backlog of more than 5 days should be addressed with a manager immediately.
2. Pending changes **reviewed weekly**. Any change over 30 days old should be addressed with the insurance carrier immediately.

3. Pending Cancellations entered into agency management system **within 48 hours** of agency receiving notification following the agency Cancellation Procedure.

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Reminder:

If you are unable to meet any of the standards listed above, you are responsible for immediately notifying the manager that is currently on-duty in the agency as soon as you realize you are overloaded. The manager will assist you with time management and help to ensure standards are met by asking other team members for help etc. . . .

I, _____ have read and agree to follow the Service Standards & Expectations. I understand it is my responsibility to notify my manager if at any time I am unable to comply with the Standards & Expectations outlined.

Employee Signature

Date