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# Autopilot Packages

## Proactive Daily Activities

- RENEWALS & Reshop
  - Identify and Generate a List of All Renewals from Carrier and AMS
  - Generate a new rate quote and set an appointment for an agent to reshop or retain the client
- ACTIVITIES list from Carrier & AMS
  - Late Payments, Cancellations, and Reinstatements
  - Voicemail, Text, & Email
  - Trailing Documents, Claims, and Policy Checking Processes
- ONBOARDING
  - New client onboarding process
  - Fix pending policy issuances

## Reactive Endorsements, Certs & Quotes

- ENDORSEMENTS
  - Lien holder change requests
  - Add/Remove Vehicles and Drivers
  - Coverage Changes
- CERTIFICATES
  - EOI, ACORD, and ID cards
- Limited NEW BUSINESS QUOTES
  - Quotes are limited relative to the premium size of the agency.
- QUOTE SHEETS and Supplementals
- CUSTOMER FOLLOWUP
  - Voicemail, Text, Email
  - Trailing document requests
  - Collect customer information
  - Complete claims process

## Phone Servicing

- INBOUND CALL SERVICING
  - Payment processing
  - Explanation of billing to customer
  - Initiate claim requests and warm transfer to claims
- CERTIFICATES
  - Requests From Inbound Calls to provide completed Certs
  - Provide other EOI
- QUOTING requests on a call
  - prepare and provide inbound call quote requests
  - Collect a commercial quote sheet for a producer to rate

## Full Service

- ▶ Proactive Daily Activities
- ▶ Reactive Endorsements, Certificates, and Quotes
- ▶ Phone Servicing