NBC Task Workflow

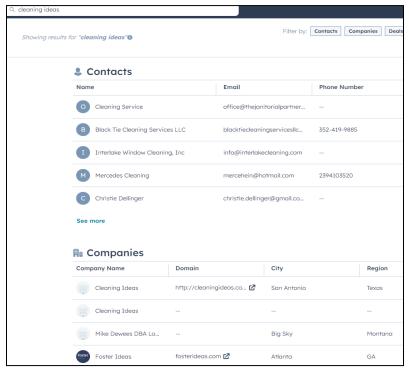
AMS - NBC

When policy is sent to be bound:

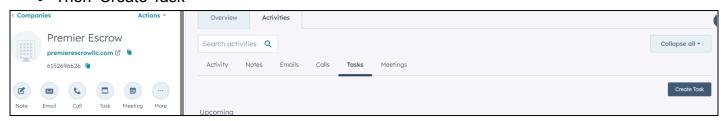
- → (NBC) Search Layr first to avoid duplicating accounts
- → (NBC) Enters the new account in Layr (see How to enter an account in Layr)

Once account is entered:

- → If Binder is available attach these at the account level with accurate description.
- → If no documents are available, move to the next step.
- → Navigate to HubSpot
- → Look up the account in HubSpot click into it.

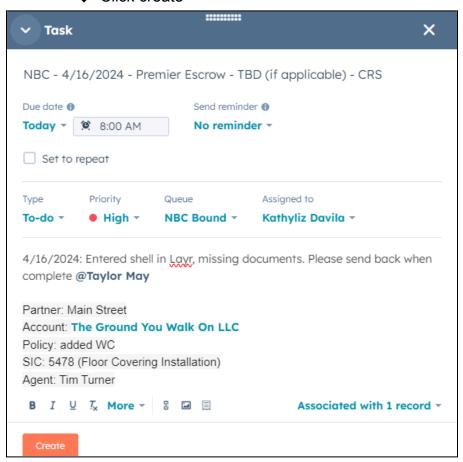


- → In the 'Activities tab', click on 'Tasks'
- → Then 'Create Task'



- → Task window pops up, (NBC) fills in the following:
 - ◆ NBC Initial date of policy Account Name Policy Number (if applicable)
 - Broker partner name
 - ◆ Due date should be Today 8:00 AM
 - ◆ Priority = High
 - ◆ Queue = NBC Bound

- Assigned to = Specific <u>AMS team member</u> (<Click here for list or see last page)
- Notate:
 - Date type of action & your full name
 - Partner
 - Account
 - Line of business
 - SIC code
 - Agent
- Associate with:
 - Add Associated Agency to be the name of the Broker partner
- Click create



Task received by AMS:

→ (AMS) - Enters the shell of the account in partners AMS systems. (even without documents)

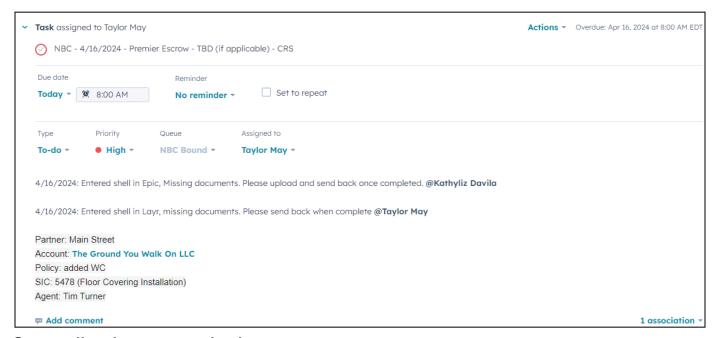
If all documents & information is received:

- → Task can be completed by:
 - ◆ Notate: Date type of action Full name
 - Click check mark to complete

◆ Then save at the bottom of the task

If missing documents/information:

- → Notate clearly what is needed to complete task
- → Due Date = In 1 Week
- → Priority = High
- → Queue = NBC Bound
- → Assigned to = Taylor May (NBC)

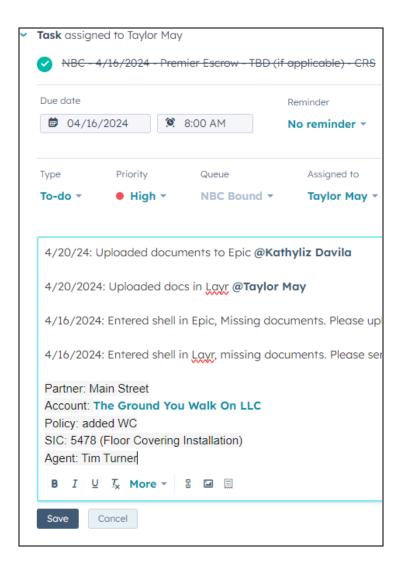


Once policy docs are received:

- → (NBC) Upload document to the policy line in Layr
- → Document Name = YY LOB Type of doc
- → Navigate to the Task
- → Notate: Date Type of action Full name
- → Change Due Date to today 8:00 AM
- → Assign back to (AMS)

AMS to finalize task:

- → (AMS) Uploads documents to partner AMS system
- → Double checks all information & makes proper updates.
- → Notate: Date Type of action Full name
- → Click check mark
- → Then save at the bottom



For every action taken on a task, clear notation, dates and your full name is required in chronological order from bottom up.

AMS Book Assignments

Partner	Completed by
Aihara & J Morey	Margaret Ged ▼
Henriott	Margaret Ged ▼
Sheally	Margaret Ged ▼
Robins	Margaret Ged ▼
Morrow	Margaret Ged ▼
CRS Insurance Brokerage	Cecilia Bobadilla ▼
Choice	Cecilia Bobadilla ▼
Insurica	Kellie Kolen ▼
Main Street	Kellie Kolen ▼
Homes, Murphy, Assoc (HMA)	Kellie Kolen ▼
Atlantic Shield	Tara Burnham 💌
Palmer & Cay	Tara Burnham 💌
Rhodes Risk	Tara Burnham 💌
Evarts Tremaine	Tara Burnham 💌
United Agencies	Tara Burnham 🔻
The Partners Group (TPG)	Lulzime Isai 🔻
Henderson Brothers	Lulzime Isai 🔻
Hotaling	Lulzime Isai 🔻
Insurace Of Carolina (IOC)	Lulzime Isai 🔻
Swingle Collins	Lulzime Isai 🔻
Lumen	Gentijana Isaki ▼
First West	Gentijana Isaki ▼
Kennedy	Gentijana Isaki →