



VIRTUAL EMPLOYEES TASKS



Our belief in Virtual Intelligence is there are only two ways to look at tasks needing to be done in an agency. The task is either a licensed or unlicensed task. 70% or more of the tasks that your agency does every day don't require a license.

Some tasks require that a licensed person be involved (mainly communication between the insured and agency); we have * those tasks.



Types of Task

1.

DIRECTOR OF FIRST IMPRESSIONS

- a. Answering inbound phone calls
- b. Calling prospects and clients
- c. Turnstyling calls
 - i. Handles Non-licensed tasks
 - 1. Billing
 - 2. Document requests
 - 3. Information gathering
 - 4. Help people download and understand the agency's mobile app
 - ii. Assign licensed tasks to a licensed team member, they are
 - 1. Bind coverage
 - 2. Discuss coverages, policies, or quotes
 - 3. Accept money for an endorsement of the policy

2. QUOTING ALL LINES

- a. Collecting information for quoting *
- b. Quoting directly on carrier websites
- c. Quoting through comparative raters (PL and CL)
- d. Renewals
- e. Rewrites

3. SERVICING

- a. Endorsements
 - i. Adding/Removing Additional Interest/ Insured
 - ii. Adding/Removing Driver, Vehicle, Lien Holder*
 - iii. Adding/Removing Item/ Coverage *
 - iv. Cancellation Request *
 - v. Process Cancellations
 - vi. Info Change or Correction
 - vii. Help Process Reinstatements *
- b. Certificates of Insurance
- c. Evidence of Insurance
- d. Audits

4. POLICY ISSUANCE

- a. Organize request to bind items from UW *
- b. Prepare to bill for issuance
- c. Create and process premium finance agreements
- d. Claims history collection
- e. E-sign creation and requirements

5. BILLING

- a. Speak with clients to assist with bills
- b. Work with a carrier to resolve the billing issue
- c. Process payments (not due to a change or endorsement) *
- d. Invoicing for bills or policy premiums

6. CLAIMS

- a. Reporting Claims
- b. Towing Bill Reimbursements
- c. Can assist in reporting Glass Claims
- d. Claims follow-up
- e. First Notice of Loss
- f. Managing claims emails and follow-ups.
- g. Handling cancellation of prior and existing policies, including sending ACORD 35 through e-signature.

7. COMMISSIONS

- a. Direct bill and Agency bill
- b. Reconcile in AMS and in Excel
- c. Create producer commission statements

8. SOURCING INFORMATION

- a. Checking fire department and fire hydrant distance
- b. Finding property information
 - i. Style of home, year built, sq ft, etc..
 - ii. Google maps
- c. Creating and finding RCE information
- d. Identifying mine subsidence, flood and earthquake zones
- e. Calling UW for UW guidelines questions
- f. Searching UW guidelines
- g. Running reports required by the carrier

9. EXTRA TASKS

- a. Create CRM pipelines
- b. Manage automation
- c. Document retrieval
- d. Data entry
- e. Call, email, or text clients or carriers
- f. Voicemail management
- g. Email management
- h. AMS/CRM migration
- i. Download reports and management
- j. Assist with soliciting and asking for Google reviews/referrals