

GuideOne COMMERCIAL RENEWAL PROCESS

ALWAYS DOCUMENT YOUR ACTIONS AND COMMUNICATIONS

1. 60 days prior to renewal send renewal letter to client - GuideOne Letter
2. Create Activity
3. Start 60 Day Commercial DB Check List
4. Create Renewal Folder in AMS
5. Received response within 12 days?

YES

NO

1. Update AMS with info received
2. Advise underwriter of any changes that affect communication, premium, or underwriting

1. 2nd request letter sent, request reply in 5 days.
2. Follow up in 7 days
3. Received response in 7 days?

45 days Prior to Expiration

Renewed

NOT Renewed

Check in with underwriter for status of renewal and respond accordingly

Policy Renewal : Download from GuideOne. Did it increase by 12% or more?

NO

YES

1. Send text and email requesting update
2. Response next day?

YES

NO

1. Ask Brian to call if assigned to Brian
2. Ask Beaux to call if assigned to any other
3. Once they have called we will proceed with renewal with what info we have.

- Update AMS
1. Renew in AMS
 2. Update in AMS
 3. Mail policy to client
 4. File policies in AMS

Ask for direction from Beaux. - Renew or Remarket?

Renew

Remarket

- RE-MARKET
1. Rate with carriers as directed by Beaux
 2. Report findings to Beaux
 3. Wait for direction from Beaux or Brian

Beaux or Brian will present to client

Renewed with original carrier

Rewritten

Lost Account

1. Note file in AMS why lost
2. If we want to retry to gain, then set reminder for 60 days prior to expiration
3. If we don't want to retry, make note why.

Lost Account

- REWRITTEN
1. File document in AMS
 2. if Download - check for download
 3. If not download - download from company, update in AMS and file dec in AMS
 4. If not auto mail company mail copy to client