AUTOMATE RENEWAL LISTS

THE RENEWAL LIST TOOL
ONE BUTTON, TWO LISTS

Customer Retention — A proactive, thoughtful, and organized approach to excellent customer service.

E&O Prevention — Prevent missed policies by providing a methodical and careful approach to reviewing coverages.

Frustration Clutter Confusion — Team work is effortless through efficient workflows, seamless creation of submissions, and shared information.

REAL-TIME, WORKABLE, AUTOMATICALLY UPDATED

MY RENEWAL LIST

- Designed for Renewal Management
- Provides view of generated list to the appropriate users
- Report can be previewed and printed from this view. Report includes stage of Renewal and all Renewal Comments

VS

MY EXPIRING POLICIES

- Designed For Account Managers and Processors.
- Provides a workable list for Renewal Comments, Creating Submissions and Renewing Policies.
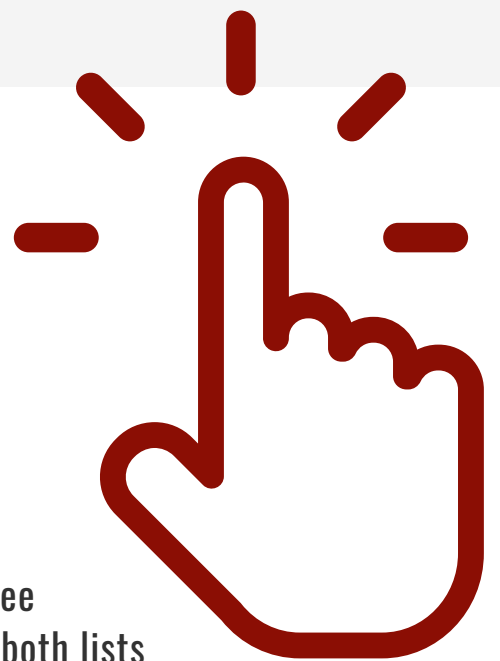
One Click Away

Expiring Policies List
- Easily access the Dec page view
- Quickly open customer records
- Seamlessly create a submission

- Quickly reassign to another employee
- Renewal notes added are visible in both lists
- Add renewal notes to the policy anytime throughout the year, and see them on your expiring policies list

Ready to get started? We can help!

Angela Adams Consulting
Shining the light to your success®

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