# VIP VIRTUAL INSURANCE PRO

**Please confirm the following qualifiers for the SIAA-VIP program. If all answers are Yes, then be sure to complete "interest in services" section on this page, and a VIP representative will contact you. Otherwise, we will see if there is a way we can assist you!**

- Our Agency Management System/database is one of the following:
- TAM online, EPIC, AMS360, HawkSoft Online or EZLynx: _____
- Our annualized revenue is $500,000 or higher:   Yes □
- We download with our carriers:    Yes □   Exceptions: _____
- Our database contains current policy coverage and underwriting detail:   Yes □
- We will follow VIP's standard workflows:  Yes   □
- Our telephone system has call transfer capability, to an external 800#, and drops off the call once the transfer is accomplished:   Yes □
- Our agency uses Outlook email:   Yes □    Agency will provide System UserIDs to VIP:  Yes □
- Please list any specialties/industries/insurance "niches" _____
- We are in the Eastern or Central US time zones:  Yes □

## I am most interested in utilizing these services:

| V-CSR Service Options | Personal | | Commercial | | |
| --- | --- | --- | --- | --- | --- |
| | 9-5 M-F | Comments | 9-5 M-F | Comments | |
| PLEASE CHECK THE OPTIONS YOU ARE INTERESTED IN: | | | | | |
| Customer Service – handling E-mail & Client Phone service - Upload to carriers, coverage discussions, Change Requests | | | | | |
| Billing ?s/Payment Inquiries Payment Acceptance | | | | | |
| Manage F/Ups, Open Activities | | | | | |
| Handling Carrier Requests | | | | | |
| Claims – First Reports to carriers | | | | | |
| *Identify Cross Sell Opportunities – VIP collects Underwriting Info for Agency to quote/market – Optional Add-on to V-CSR Program | | | | | |
| Back Office/Processing Items: | | | | | |
| Policy Checking/Non-Download | | | | | |
| Renewal Policy/EN Processing | | | | | |
| Misc. Mail Processing/Handling | | | | | |

**Your name and agency position: _____**

**VIRTUAL INSURANCE** PRO

**Contact me via my phone/email: _____**

## Our Virtual CSR Program Information:

| V-CSRs<br>(Virtual Insurance Customer Service Reps) |
|---|
| **Standard CSR services - Personal and Commercial Lines** |
| **VIP has documentation standards in place/follows Best Practices** |
| **Daily services – additional phone coverage is scheduled in advance** |
| **40-hour work week; 9-5 Monday-Friday is CORE for this service** |
| **Think of VIP as your All Carrier Service Center** |
| **You have Dedicated VIP Team Members assigned to your agency** |
| **GO LIVE 4-6 weeks from receipt of signed contract & deposit** |
| **Your Savings?** VIP covers all employee benefits for our staff – what is that in your overhead? See below for you Indirect Productivity Savings using VIP |
| Discounted for SIAA Agencies:  $2,500 sign-up fee; $2,000 upfront, remainder billed over 2 months  (25% discount) |
| $2,250 - $8,250 month, based on option selected = Pricing Based on Volume<br>Pricing will be reviewed on a Virtual meeting, after completion of this document. |

| **Your Indirect Productivity Costs:**<br><br>**(For your Employees)** | **Estimated Agency Hours Spent:** | | **If you "hire" Virtual Insurance Professionals:** |
|---|---|---|---|
| Cost of training provided by agency | 2 | hours per month | No Cost to Agency |
| Mandatory department meetings or Coaching Sessions | 2 | hours per month | No Cost to Agency |
| Time spent on training employee on agency & office procedures | 1 | hours per month | No Cost to Agency |
| Personal Days or Sick Time | 5 | days per year | No Cost to Agency |
| Vacation Days | 2 | weeks vacation per year (Min) | No Cost to Agency |
| Personal time spent on internet **(conservative!!)** | 2 | hours per week | No Cost to Agency |
| Time spent on insurance underwriting | 1 | hours per week | No Cost to Agency |

| | | |
|---|---|---|
| changes, new computer procedures | <span style="background-color:yellow"> </span> | |

**Total Hours Lost**
**Productivity Per Year:**        **306**                                **0**  **"if you hire VIP"**

**FOR FURTHER DETAILS, PLEASE CONTACT:   NORMA M MILNE  nmilne@vinsurancepro.com**