

Please confirm the following qualifiers for the SIAA-VIPro program. If all answers are Yes, then be sure to complete “interest in services” section on this page, and a VIPro 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 VIPro’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 VIPro: 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 ViCSR						
Back Office/Processing Items:						
Policy Checking/Non-Download						
Renewal Policy/EN Processing						
Customized Program Requests						

Your name and agency position: _____

Contact me via your phone/email: _____

Our Virtual CSR Program Information:

ViCSRs (Virtual Insurance Customer Service Reps)
Standard CSR services - Personal and Commercial Lines
VIPro had 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 us as your All Carrier Service Center
You have Dedicated VIPro Team Members assigned to your agency
GO LIVE 4-6 weeks from receipt of signed contract & deposit
Your Savings? VIPro covers all employee benefits for our staff – what is that in your overhead? AND, Partnering with ViP results in Productivity Savings (see below)
Discounted for SIAA Agencies: \$2,500 sign-up fee; \$2,000 upfront, remainder billed over 2 months
\$2,250 - \$8,250 month, based on option selected = Pricing Based on Volume Pricing will be reviewed on a WebEx, after completion of this document.

Your Indirect Productivity Costs:	Estimated Agency Hours Spent:	If you "hire" Virtual Insurance Professionals:
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(For your Employees)

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 changes, new computer procedures	1	hours per week	No Cost to Agency

Total Hours Lost Productivity Per Year:	306	0 "if you hire VIPro"
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FOR FURTHER DETAILS, PLEASE CONTACT: Dennis B. Burke dburke@vinsurancepro.com