



## New Business Process

01

### Initial Steps

Producer, Market Specialist, CSA

- Producer forwards signed BOR letter to Market Specialist & CSA
- Producer sends declarations pages + programming notes to Market Specialist
- Producer sends QRF to Market Specialist, *if applicable*
- CSA reaches out via email to insured within 24 hours of the BOR being signed
- Market Specialist moves the account from marketing to current clients under pending AOR (PAR) when the signed BOR letter is received



02

### Acord Applications

- Market Specialist has Resource Pro enter Acord applications for validated producers
- Unvalidated producers complete Acord applications and forward to Market Specialist



03

### BOR Submission & Service

- Market Specialist sends signed BOR letter + Acord applications to the applicable BOR carrier
- Market specialist sets epic activity to the rescinding period date and confirms T.I.C. appointment with the carrier when the date arrives
- Market specialist sends the submission to any additional carriers if requested via QRF
- CSA handles all relevant service items as determined by the carrier when the rescinding period date arrives



04

### Proposal & Policy Review

- Market specialist provides a proposal (via Resource pro) to the producer after the rescinding period ends once TIC has custody of all relevant policy information.
- If the account is being shopped with additional carriers, Market specialist will provide an updated proposal when the marketing is complete
- Producer performs full detailed policy review with client



05

### New Business Order

- Producer provides completed Commercial lines order form (CLO) to Market Specialist & CSA
- Producer provides the Producer Request Form to the Risk Management team and CSA, *if applicable*



06

### New Business Completion

- Market specialist completes the new business onboarding checklist
- Producer, CSA, and Market specialist conduct new business onboarding huddle
- CSA continues to handle all relevant service items including issuing new certificates, cab cards, etc, etc...

