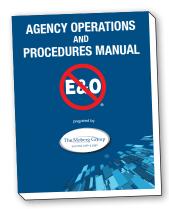
### The Moberg Group

success with a plan

# AGENCY OPERATIONS AND PROCEDURES MANUAL





#### **EASILY CUSTOMIZED FOR YOUR AGENCY**

- General Agency Procedures
- Commercial Lines Procedures
- Personal Lines Procedures
- Employee Benefits Procedures
- Job Descriptions
- TMG Industry Forms included at no extra charge



After years of trying to write a manual for your office, you can now buy a complete manual and with very little time and effort customize it to fit your agency using basic word processing skills. Whether processing a non-premium endorsement, or the most complex reporting form policy, the easy to follow workflow make the process simple. Provided on USB Drive for ease of editing, this manual is ideal for training new employees, reinforcing procedures to existing employees, and to meet the requirements of the "Rules of Evidence".

#### THIS COMPLETE MANUAL INCLUDES:

#### **General Agency Procedures**

Automation Policy
Binding Procedures
Mail Handling Procedures
Claims Processing Procedures
E&O Risk Management
Procedures
E&S/Residual Marketing
Procedures
Telephone & Fax Procedures
E-Mail & Internet Procedures

### Personal Lines Work Flow & Procedures

Quotation Procedures
New Business Procedures
Renewal Procedures
Endorsement Procedures
Cancellation Procedures

#### **Job Descriptions**

Agency Manager
Producer
Marketing Manager
Customer Service
Representative
CSR Assistant/Processor

### Commercial Lines Work Flow & Procedures

Lead Development
Quotation Procedures
New Business Procedures
Renewal Procedures
Endorsement Procedures
Cancellation Procedures

### **Employee Benefits Procedures**

Prospecting
Quotation Procedures
New Business Procedures
Renewal Procedures
Individual Life & Health
Procedures

### **GET STARTED TODAY!!!**

TMG IS ALSO AVAILABLE TO HELP YOUR AGENCY WITH CUSTOMIZATION. CALL OR EMAIL FOR A QUOTE.

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