

New Business Task Checklist

LEAD IN > QUOTE DELIVERED
DELIVERED > BOUND
POST-BINDING OBLIGATIONS

Name of insured:

Date of initial contact:

- Complete Discovery Call with Prospect
- Verify contact and risk data are complete and accurate in Nexsure
- Determine target market(s) for prospect
- Complete required submission forms/application (IF ANY)
- Upload required documents and PDF for prospect to h
- Prepare proposal and send to Prospect
- Update contact and opportunity in Nexsure; create notes as needed to document
- Confirm effective date and coverage details for all policies
- Confirm Mortgagee, Lienholder and Additional Insured parties and info (IF ANY)
- Confirm billing preferences and set expectations for future billing process
- Confirm preferences for PRIOR POLICY cancellation (IF ANY)
- Set expectations for electronic signature and document delivery
- Set expectations for onboarding and first year activity, including first renewal
- Upload binding documents and invoice (IF ANY) to contact in Nexsure
- Send EOI/COI to all relevant parties (Insured, Mortgagee, Additional Insured, etc.)
- Activate client portal access and initiate new client onboarding automation in Nexsure
- Process and record any applicable payment received (IF ANY)
- Delivery any promised value-add items or third party logins to insured
- Conduct a Final Review to ensure all documents and account details are buttoned up
- Set expectation for 30 day happiness check and mid-year review