

## NowCerts - Category Job Aid

Proactive - Claims - Carrier Notification

Proactive - Cancellation - Client Request

Proactive - Cancellation - Pending Non-Pay

Proactive - Endorsement Issue Verification

Proactive EOI/COI - No Premium Change

Proactive - Non-Renew Cancellation - Carrier

Proactive -Policy - E-Sign Docs

Proactive - Policy - New Sale

Proactive - Policy Change - Additional Interest

Proactive - Policy Change - Information Correction

Proactive - Policy Renewal

Proactive - Quote - New Business

Proactive - Quote - Remarket/Mid-term

Proactive - Quote Remarket/Renewal

Proactive/Phones - Underwriting Request - Audit

Proactive/Reactive - EOI/COI Coverage/Premium Change

Phones - Claims - Carrier Notification

Phones - Billing Review/Question

Phones - Cancellation - Client Request

Phones - Intake/Cross Sell

Phones - Intake/New Prospect

Phones - Mortgagee Change

Phones - Payment

Phones - EOI/COI - No Premium Change

Phones - Policy - Review/Renewal

Phones - Policy Changes - Drivers

Phones - Policy Change - Vehicles/Property

Phones - Policy Change - Coverage Change

Phone - Policy Docs - Client Request

Phones - Spam

Phone - Transferred to the Agency

Phones - Voicemail response

Reactive - Policy Change - Drivers

Reactive - Policy Change - Drivers

Reactive - Policy Change - Vehicles/Property

Reactive - Policy Changes - Coverage Changes

Reactive - Quote - New Business

Reactive - Quote - Policy

Reactive - Quote - Remarket/Mid-term

Reactive - Quote/Renewal