Chapter 13

Re-Marketing Policies

IN THIS CHAPTER

- * Re-Market an Existing Line of Business
- * Updating the Marketing Header and Form
- Delivering the Marketing Application
- * Copying the Marketing Application to Submit to Other Carriers
- * Updating the Status
- ***** Tracking the Marketing Submission
- * In-Forcing a Re-marketed Renewal Submission

Re-Market an Existing Line of Business

Policies may be re-marketed at any time, although prior to renewal is standard. Re-marketing a policy at renewal allows the Agency the flexibility of obtaining various quotes from different carriers for their clients and selecting the lines of business they want to include in the quote.

HOW to Remarket an Existing Line of Business

- After accessing the appropriate client through SEARCH, click the SERVICING link on the Client menu.
- Select the Marketing Existing line of business option. Place a check in the Refresh form prefills check box to refresh Applicant and Contact information with data from the current CLIENT PROFILE. The remaining data is copied from the application(s) selected to re-market. Leave the Refresh form prefills check box empty to copy all data from the application(s) selected to re-market. All information will be copied with a new Application Date.

Note: The option to **Refresh form prefills** refreshes only those fields that are pre-filled from the **CLIENT PROFILE** when creating a new application. Information added through **Lookup** is not updated when **Refresh form prefills** is selected. To ensure that refreshed data is correct make sure to update information held at Client Profile level prior to renewing the policy. For fields that populate to the ACORD 125 and 130 forms, see *Tips & Facts Vol. 4, Issue 9* found in Nexsure Help.

The effective date at the top of the servicing screen will default to today's date and does not need to be changed. The policy(ies) selected for re-marketing will determine the effective date on the Marketing header. The Description and Memo fields on the Servicing screen will default to Re-market policy. To replace text, highlight and type text into the Description field or append text. When tabbing from the Description field the Memo field defaults to what was entered in the Description field. The text may be changed or appended to in this field as necessary. The Description field can hold up to 95 characters and the Memo field is not limited to this small amount and is intended to be used to fully describe what is being done. While both of these fields are used to create the renewal annotation action, it is the Description field that can be seen on the policy summary screen, so make sure to enter a short descriptive message that will supply at a quick glance what was done.

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Edit				Enter additional not	es to populate the a	Note: This into	mation will populate the action	description field.		120		
Endorsement					es to populate the o	Re-market p	olicy.					
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Cancellation)	Showing Page 1 of 1	1 🗸			Filters: [Show]		
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Audit	Select		Policy Number	Description	Mode	Updated By Updated Date	Billed Premium	Term	Term	Billing Carrier		
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Renewal Certificate(s)		2	General Liability -	Policy In Force	New	Mary Oberleitner	\$0.00	08/20/2008	08/20/2008	Auto-Owners Insu		
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- All in force policies will be displayed. A package policy will display each line of business with a check box for individual selection. During the re-marketing process, individual lines of business can be grouped together, to create a package policy or lines of business on an existing package policy can be selected singly to create a monoline policy.
- Applications in History can be included in the re-marketing process and added to existing lines of business. Click the [Show] filter and change the Include History drop-down box to Yes. Click the Search button.

Note: Use the **[Show]** filter to include marketing applications for selection in the remarketing process. Change the **Policy Stage** drop-down box to **Marketing Only** or **Include Marketing** and click the **Search** button.

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lient Name: Oxford Airport	TING POLICIES CLAIMS SERVICING ATTACH	TENTS ACTIONS TRANSACTIONS DELIVERT	PEOG			Commercial Account						
servicing												
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Marketing	This option is used to create new or remarket submis	sption is used to create new or remarket submissions.										
Market Analysis		Enter the desired effective date of the new policy 55/06/2016										
Binders		Enter a brief description of the	marketing record: Re-market policy.									
Edit			Note: This information	will populate the action description field								
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	General Liability - GL-700000-1	Policy In Force New	Mary Oberleitner 08/20/2009	\$0.00 08/20/2008 \$0.00 08/20/2009	08/20/2008 08/20/2009	Auto-Owners Insu Auto-Owners Insu						
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- Select the lines of business that will make up the re-marketed renewal submission by clicking in the appropriate check boxes.
- Click the **Create Marketing** button.
- If any associated units at risk were modified and not previously updated on the form the opportunity is provided to update the renewal with the modified information after the renewal is created. Click the Select all check box and then click Update Selected. If none are selected, then the Skip button is active. If Skip is clicked the associated units at risk will not be updated automatically to the forms.

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Audit		
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Verification(s)		

• The **underwriting** tab is displayed with a new marketing header ready for completion.

Note: An action, with a closed status, is created after saving the changes to the header. Nexsure tracks the marketing submission, but if a personal follow up for the marketing quote is necessary, the status of the action can be changed to Open. Actions will be discussed in a later chapter.

Notes

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Updating the Marketing Header and Form

The **underwriting** tab displays the marketing header in a wheat color background. The Action and the Lines of Business selected display beneath the marketing header.

HOW to Update the Marketing Header

- After accessing the appropriate client through SEARCH, click the MARKETING link on the Client menu.
- All marketing submissions are displayed in a summary view.
- Click the **Details** icon of the marketing submission to be worked on.
- The underwriting tab is displayed.
- The Policy Info screen populates as follows: Commission defaults will be based on the Orgs invoice default settings. If Copy Policy Info Screen is selected on the Orgs invoice default setup tab, the policy info from the originating record is copied. If Policy Info screen default values are selected, commission defaults will be based on the defaults set up for the carrier, retail agent and employee for other commissions. For details on invoice default setup see, Accounting Training Chapter 3.
- The **Branch** of the policy being re-marketed defaults in.
- The Policy Type will display as either Monoline or Package, depending on how many lines of business were selected to re-market. The Primary State pre-fills from the application(s) selected.

Note: The two **Policy Types** are **Monoline** and **Package**. A **Monoline** policy contains one line of business, a **Package** policy contains more than one line of business.

- Select the Issuing Carrier and Billing Company the submission is being re-marketed to from the Issuing Co: and Billing Co: drop-down boxes. The Issuing and/or Billing Co may be left Unassigned.
- Leave the **Policy Number** field as **Unassigned**.
- Enter a **Policy Description** to categorize the marketing submission.

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- The Policy Term dates will default to one year from the effective date entered on the Servicing screen. If the policy term date is incorrect modify the dates by clicking the Calendar icon. Make sure to click the Save Changes link on the navigation toolbar after altering anything on the header to keep the changes.
- The **Coverage Term** dates will become active if coverage is placed in force.
- The Stage, determined by Nexsure, will display as Marketing.
- The policy Mode, determined by Nexsure, reflects the Mode of the policy(ies) selected for remarketing. However, if the mode on the policy selected to re-market had a Mode of New, the Mode list will be active allowing the user to change the Mode to New on Existing. Selecting this mode will help keep track of new policies added to the existing client.

Note: Always go through **SERVICING** > **Renew** to renew a re-marketed policy. Do not In Force from the applications in marketing. For information on renewing a policy that has been re-marketed, see "HOW to Renew a Policy That Has Been Re-Marketed" in Chapter 14, "Renewing Policies".

• The **Status**, identified by the user, defaults to **Pending**. The Pending status is used while gathering information and updating the marketing application.

Note: Changing the status throughout the marketing process will allow a quick overview of the submission and keep you informed of where the submission is in the marketing process.

- Click the Save Changes link in the navigation toolbar under the marketing header. This step is critical to store any modifications to the header.
- Review the information contained in the application(s) for accuracy, if changes need to be made proceed to HOW to Update the Form section in this chapter.
- If the application is accurate:
 - □ Change the **Status** in the marketing header to **Submitted**. If Submitted was selected prior to full completion of the application, use the drop-down box to change back to Pending to modify the application.

Note: A **Submitted** status locks down all applications; no changes can be made to an application while there-marketed quote is in a **Submitted** status.

- Click the **Save Changes** link in the navigation toolbar under the marketing header.
- Proceed to **Delivering the Marketing application** section in this chapter.

HOW to Update the Form

When a policy is selected during the re-marketing process, the system automatically copies the information in the existing applications selected. Some modification of the application information may be necessary, so always review the copied application for accuracy. To update the form:

- After accessing the appropriate client through SEARCH, click the MARKETING link on the Client menu.
- All marketing applications are displayed in a summary view.
- Click the **Details** icon of the marketing application to be worked on.
- The **underwriting** tab is displayed.
- All form(s) are available for completion in the **navigation** tab on the right side of the screen and will display forms in a tree format as they are accessed.
- In the **navigation** tab, click the plus [+] in front of the line of business to be modified.
- Click the plus [+] in front of the ACORD form, to be changed. This will expand the ACORD form
 out into a tree format for completion.
- For assistance completing forms, see "HOW to Work with Forms" in Chapter 5, "Marketing".
- Any changes that need to be made to any associated units at risk displayed in schedules with a yellow **Details** icon should always be made from client profile level. This will ensure that all records are updated appropriately.
- Removing associated units at risk from a form: Clicking the **Remove** link on a scheduled item that is associated with another part of the form (such as removing a location from the ACORD 140 that has an **Additional Interest**) for the selected location will provide the ability to also remove the **Additional Interest**.



- After all forms have been completed, click the word Underwriting in the navigation tab to close the applications.
- When the application has been completed change the Status of the quote in the marketing header from Pending to Submitted. Remember, that a submitted form may not be edited.

Note: Forms may also be completed by clicking the **List** link found on the navigation toolbar after opening the form to complete on the navigation tree. Make sure to save the form periodically during the data entry process by clicking the **Save Form** link or **Update** button.

- Click the Save Changes link in the navigation toolbar under the marketing header to save the change in status.
- Clicking the **Print** link in the navigation toolbar under the marketing header will allow a print preview of the applications in Adobe Acrobat. The form will display an Adobe Acrobat toolbar that may be used to print or save the applications to one of the agent's local drives if desired.
- Proceed to **Delivering the Marketing Application** section in this chapter.



Delivering the Marketing Application

- After accessing the appropriate suspect/prospect or client through SEARCH, click the DELIVERY link on the Client menu. If previous deliveries have been sent they will appear in a summary view depending on how the [Show] filter has been configured.
- Click the [Add New] link. The delivery > e-mail tab is displayed.
- The re-marketed application can be sent from Nexsure as an e-mail or fax. The e-mail tab will default, if faxing the application click on the fax tab.
- Complete the required e-mail or fax information on the left side of the screen.
- The right side of the delivery screen is used to attach forms and documents to the e-mail or fax. Click the Add link in the gray Policies line.
- The attachment pop-up window policies tab will display. Click the Policy Type drop-down box at the top of the screen and select Marketing.
- All marketing applications display with their Policy Number, Stage, Status, Issuing Carrier, Coverage Term and Policy Terms. Select the appropriate option for the re-marketed application being sent.
- Click the **Next** button.
- All lines of business applicable to the selected marketing policy will be available.
- Select the lines of business to be included in the e-mail or fax by clicking the appropriate check boxes.
- Click Attach to attach the forms to the e-mail/fax. Clicking Back will page back or click Close to abort.
- The attachment will display, with the total number of items attached, on the right side of the delivery screen.
- Click the [Send] link to send the e-mail or fax.
- The Delivery Summary View screen displays with the stage of the e-mail or fax. The stage will update as the screen is refreshed.
- If the e-mail is unsuccessful, the sender will receive an unsuccessful e-mail message in their mailbox. If the fax is unsuccessful, the sender will receive a Delivery Failure Notification in their mailbox.
- Each delivery will have its own **Details** icon. To view the details, perform the following steps:
 - Click the **Details** icon to display the e-mail or fax information, the forms included, and the total number of attachments.
 - Click the viewer tab and each form included in the e-mail or fax is displayed with a Magnifying Glass (1) icon.
 - Click the Magnifying Glass (4) icon to view the information contained in the application that was sent.

Note: The Delivery Summary View screen can be accessed from the **Home** menu, or the **Client** menu. The **Home** menu will display a summary by default of all unsuccessful deliveries sent by the user. The client level only displays deliveries for the specified client.



Copying the Marketing Application to Submit to Other Carriers

Once an application has been re-marketed through the **SERVICING > Marketing > Existing Line of Business** option and the application has been updated and submitted to the first carrier, the updated application may be copied to submit to other carriers.

HOW to Copy the Application to Submit to Other Carriers

The **Mass Marketing** option can be used to generate multiple copies of a marketing record for submission to different carriers. Marketing results may be maintained on each carrier's record for comparison, documentation and tracking purposes.

- Locate the client through **SEARCH** and click the **MARKETING** link on the Client menu. The client's **marketing** tab is displayed with a summary of marketing records.
- Right-click on the **Details** icon next to the marketing record to be submitted to other carriers.

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 Select (left mouse click) Mass Marketing from the right-click menu. The carrier selection dialog box is displayed.

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Issuing Carrier:	Upassigned
Billing Carrier:	Travelers Insurance Company
Policy Number:	Unassigned
Policy Description:	Travelers - Market all LOBs
Action Description:	Mass Marketing to Travelers
	Save Save & Add Cancel

- Information from the carrier selection dialog box will populate the header and action associated with the new marketing record. Select the Issuing and Billing carriers for the new marketing record. The carrier may remain unassigned. Enter a policy number if known in the Policy Number box. The Policy Description will default from the original marketing record and may be edited for the new record. The Action Description displays Mass Marketing by default. The default can be accepted or a new description for the annotation can be added. Mass Marketing Action Annotation defaults may be modified in SETUP > Actions > actions tab > Marketing Action Topic > Mass Marketing Action Type.
- If the marketing record is being submitted to only the one additional carrier or the information displayed is for the final record to be added, click Save. To continue copying the marketing record for additional carriers, click Save & Add. The new marketing record will be added and a new mass marketing dialog box will be displayed. Click Cancel to close the mass marketing dialog box without adding a new marketing record.
- When the last mass marketing record has been saved, click the MARKETING link on the Client menu to refresh the marketing summary. The new marketing records are added to the marketing tab. Each new marketing record is a copy of the original. Commission defaults will be based on the Orgs invoice default settings. If Copy Policy Info Screen is selected, the the policy info from the originating record is copied. If policy info default values are selected, commission defaults will be based on the defaults set up in the assigned carrier's record. If the carrier is unassigned, commission information will be copied from the original marketing record. Attachments, Actions and policy info premium/fee/tax information are not copied. For details on invoice default setup see, Accounting Training Chapter 3.

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		Workers Compensation				\$0.00			
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- If changes need to be made to the applications for any carrier, click the **Details** icon for the marketing record that is to be changed. Leave the status as **pending** and refer to "HOW to Update the Form" earlier in this chapter. After all changes have been made to the application, change the **Status** in the Marketing header from **Pending** to **Submitted** and click the **Save Changes** link in the Navigation toolbar. If changes do not need to be made to the application, simply change the **Status** to **Submitted** and click **Save Changes** link in the Navigation toolbar. If changes do not need to be made to the application, simply change the **Status** to **Submitted** and click **Save Changes** link in the Navigation toolbar to save the status change.
- See "Delivering the Marketing Application" earlier in this chapter to deliver the forms to the other carriers.

HOW to Use the Marketing Summary Screen

Unlimited marketing applications may be added when re-marketing a policy at renewal for an entity. They will be displayed in a summary view when clicking the **MARKETING** link on the **Home** menu or **Client** menu. The summary view will give you pertinent information for each marketing submission created.

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		Crime				\$0.00			
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		Property - Commercial				\$0.00			
		Workers Compensation				\$0.00			
	6	Copy Hartford submission	for Travelers 20	08 renewal mark	eting				
							m	narket analysis / history	marketing

- After accessing the appropriate client through SEARCH, click the MARKETING link on the Client menu.
- All marketing applications are displayed in a summary view.
- Clicking the **Details** icon will display the **underwriting** tab for the selected marketing application.
- Clicking the Assign icon will display the Assignment List pop-up window with the list of people in the agency assigned to this marketing application.
- Holding the cursor over the Line of Business/Policy Number/Policy Description/Policy Type or the Estimated Premium fields will display the information in a larger font for ease of reading. Clicking those items in the summary view will open a display box containing the selected information.

- The **Stage** is determined by Nexsure and will display Marketing. The **Status** is determined by the user and will display where you are in the marketing process for the submission.
- The Mode is determined by Nexsure and will display **New**.
- The Updated By and Updated Date display the person who updated the marketing submission along with the date it was updated.
- The **Estimated Premium** will display the quoted premium from the carrier.
- The **Policy Term** will display the effective and expiration dates of the submission.
- The **Issuing Carrier** and **Billing Carrier** will display the carrier who the submission was submitted to.
- The Remove icon will allow this marketing submission to be deleted. If the Remove is not available, see the Nexsure point person within the agency for assistance.

Note: As marketing submissions are modified and saved, the information in the marketing summary view will be updated as well.

Updating the Status

When a quote is received from a carrier, the status should be changed as well as entering the quoted premium, any applicable fees and/or taxes and commissions. If the carrier requires changes made to the applications and requests the quote be resubmitted see **Chapter 5**, **Marketing**, **HOW to Revise a Submitted Marketing Quote** for information.

HOW to Update the Status

- After accessing the appropriate client through SEARCH, click the MARKETING link on the Client menu.
- All marketing quotes are displayed in a summary view.
- Click the **Details** icon of the re-marketed quote for the appropriate carrier.
- The **underwriting** tab is displayed.
- Change the status in the Marketing header from **Pending** to **Quoted**.
- Click the Save Changes link in the navigation toolbar under the header.
- Click the **policy info** tab.
- For instructions on entering the quoted premium, any applicable fees and/or taxes and commissions, see "HOW to complete the Policy Info Tab" in Chapter 5, "Marketing. Remember, this step is important to show what carriers have quoted the risk so you will know who still has not sent in a quote yet.

Tracking the Marketing Submission

Marketing submissions can be tracked from the **MARKETING** link on the **Home** menu, which will display all marketing submissions for the agency, or the **MARKETING** link on the **Client** menu, which displays only marketing submissions applicable to the selected entity.

Note: The defaults in the **[Show]** filters will determine what is displayed in the summary view when clicking the **MARKETING** link on the **Home** menu or the **Client** menu.

HOW to Track Marketing Submissions from the Home Menu

The **HOME** > **MARKETING** link serves as a way to keep track of submissions identified with a Policy Mode of Marketing. It is not necessary to create **Actions**, or to change the status of an **Action** created by Nexsure to **Open**, in order to track these marketing submissions as Nexsure keeps track of them for you. The **HOME** > **MARKETING** link includes both new or renewal submissions being re-marketed. The **Home** menu is accessible by clicking the **HOME** link on the **Utility** menu in the upper right hand corner of the screen. The **HOME** > **ACTIONS** screen will be the first screen displayed. Click the **MARKETING** link on the **Home** menu to display all the open marketing submissions. The **Home** menu is the third link.

Note: After the marketing submission has been bound or sent to history, it will no longer display on the **Home > marketing** page.

- Clicking the MARKETING link on the Home menu displays all marketing submissions that fall within the search filter criteria for the agency.
- If the marketing submission is not displayed, click the [Show] filter, change the search criteria and click the Search button to initiate a new search.
- Marketing submissions displayed on the HOME > MARKETING screen will have two Details icons.
 - Clicking the first Details icon, with the dark blue border, will display the card file for the client.
 - Clicking the second **Details** icon will display the **marketing** tab with the pending marketing submission.
 - If multiple marketing submissions have been done, each submission will have its own
 Details ricon.

HOW to Track Marketing Submissions from the Client Menu

- Access the appropriate entity through **SEARCH**.
- Click the MARKETING link on the Client menu. All marketing submissions that fall within the search filter criteria for the client will be displayed in a summary view. Each marketing submission will have its own Details ricon.
- Clicking the **Details** icon will display the **underwriting** tab of the pending submission selected.

In Forcing a Re-marketed Renewal Submission

If a re-marketed renewal submission will be issued for the renewal term, you must go through **SERVICING** > **Renew** in order to display the correct mode in the policy header and update the expiring policy with a status of renewed. For instructions see "Renewing Policies", in Chapter 14, *CRM Training Manual*.

