

## **CUSTOMER SERVICE MEASURE OF PERFORMANCE**

### **Time Management/Productivity**

- All work is processed and completed at the earliest opportunity. If quick and accurate turn-around on tasks cannot be delivered, informs Supervisor when help is needed. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Requests for a WC quote are completed within one hour on complete applications. If the application is incomplete or needs to get more information, responds to the underwriter within one hour with a request for information or with a plan that forecasts when the quote will be delivered. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Submits to a carrier for quoting, any submission is completed within an hour. If the application is incomplete or more information needed, responds to the Beacon underwriter within one hour with a request for information or with a plan that forecasts the quote will be delivered. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Respond to emails with one hour. If cannot respond fully within one hour, provides a response within one hour with a plan to respond in full. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%.
- Provides underwriters with all required information to quote a renewal at least 90 days in advance of renewal and list the renewal in the underwriters 'to-do' list. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Always observes Company office hours of work as provided for in the Employee Handbook. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%

### **Communication**

- Converses orally and in writing using business level/professional English. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Written communications are free of grammar and spelling errors. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Makes Supervisor aware when has time to do more work. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Makes supervisor aware when job duties or priorities conflict with each other so that delivery of work on time can be accomplished within the time allotted. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%

### **Accuracy**

- Attaches Experience Mods properly to each quote or renewal. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Attaches Experian scores properly to each quote or renewal. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Uses the correct class codes. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Attaches the proper endorsements. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%
- Quotes reflect direction given by the underwriter. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%

### **Trust and Honesty**

- In accordance with the Employee Handbook, is truthful and respectful of coworkers and supervisor. Meets= 100%

### **Conduct and Behavior**

- Routinely exhibits conduct and behavior as required by the Employee Handbook, General Guidelines. Does not Meet < 90%; Meets= 90%- 95%; Exceeds= 95%-100%