

opsdog

BPMN 2.0 FORMAT

INSURANCE

Auto & Home Insurance Sales

The OpsDog Financial Services Hierarchy

- Insurance
- Banking
- Broker Dealer
- Investment/Asset Management
- Consumer Finance

Agency Operations

- New Business Processing
 - Auto & Home Insurance Sales
- Underwriting
- In-Force Customer Service
- Claims
- Case Management/Settlements
- Actuarial
- Investments

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Auto & Home Insurance Sales: Workflow

- Quote
- Policy Origination
- Client Servicing/Claims

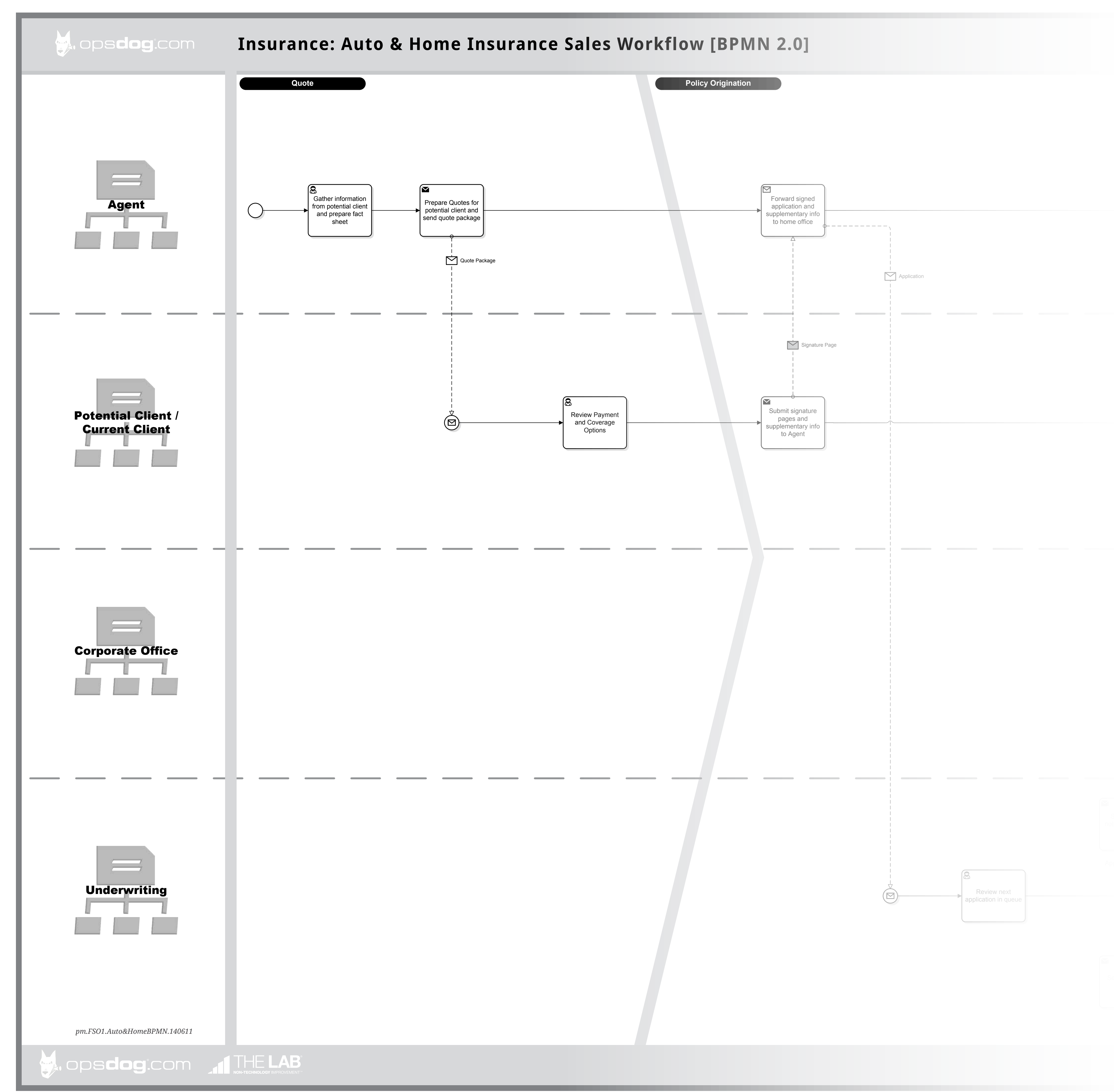
Workflow Description

The attraction and identification of potential customers, specifically for auto and home insurance. Includes lead generation, policy selection, initial premium estimation, and sales staff hiring and training.

Legend

- Start Event
- Intermediate Event
- End Event
- Gateway
- Group
- Task
- Expanded Sub-Process
- Pool
- Sequence Flow
- Message Flow

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