

opsdog

BPMN 2.0 FORMAT

INSURANCE Insurance Sales

The OpsDog Financial Services Hierarchy

- Insurance
 - Banking
 - Broker Dealer
 - Investment/Asset Management
 - Consumer Finance
- Agency Operations
 - New Business Processing
 - Insurance Sales
 - Underwriting
 - In-Force Customer Service
 - Claims
 - Case Management/Settlements
 - Actuarial
 - Investments

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Insurance Sales: Workflow

Policy Sales

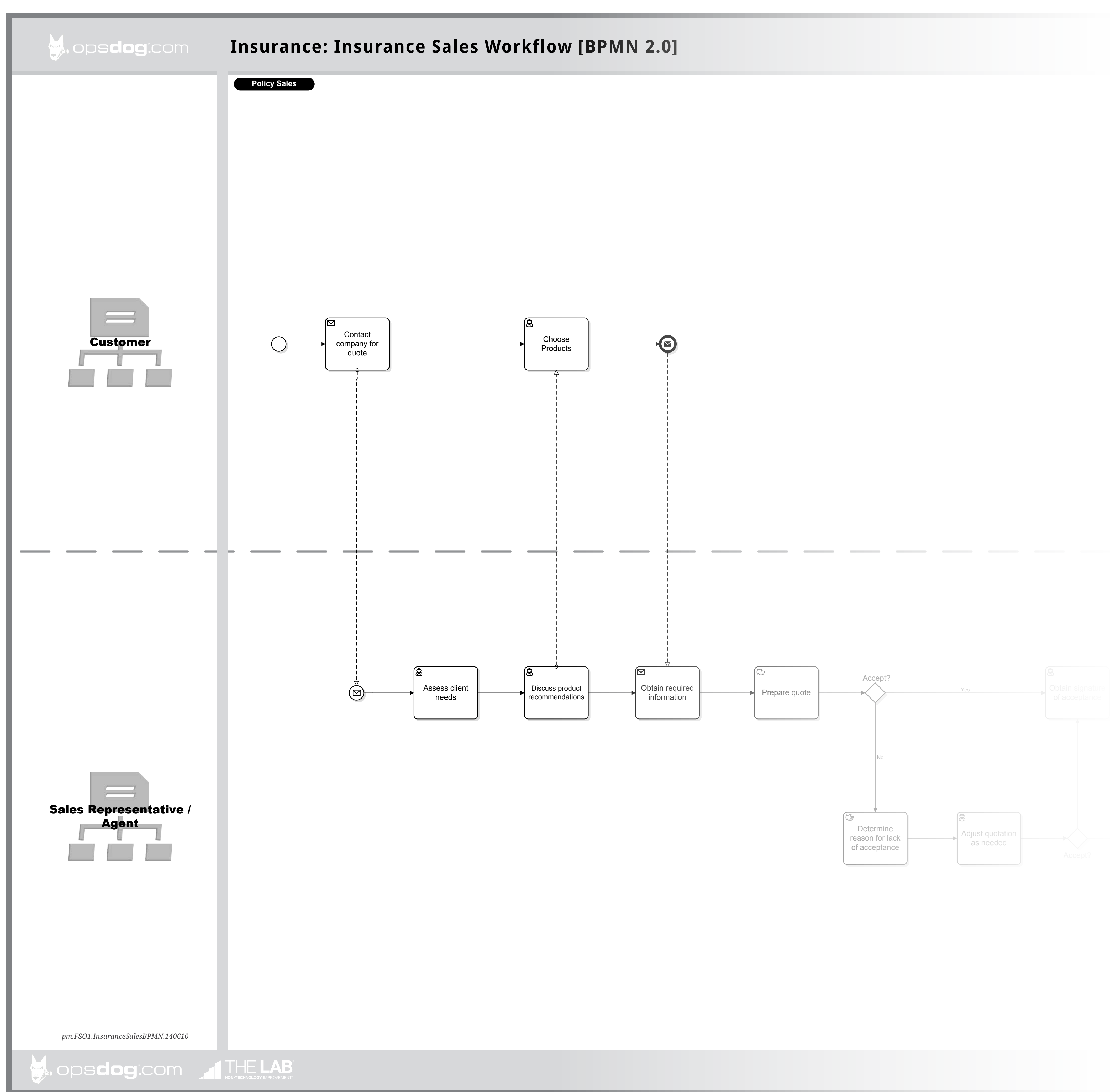
Workflow Description

The process of signing up a new client for a policy involves an agent or a call center representative, and both perform roughly the same task. The agent or representative (hereafter, agent) discusses available insurance products with the prospective client and obtains necessary information. The agent then determines eligibility and prepares a quote. Some negotiation with the client may take place. Finally, payment is set up and the new policy goes to underwriters for final processing.

Legend

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

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT



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