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INSURANCE MANAGEMENT PROCEDURE

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New Agency Toolkit - Independent Insurance Agents of Texas

The 6 Processes Your Insurance Agency Should Be Automating. Automating Tasks, Reminders, & Communication. Do you ever feel (or even look like) the guy in the image above? Surrounded by post-it notes and paper files to remind you of upcoming to-dos, you likely feel overwhelmed and a little frustrated.

The 6 Processes Your Insurance Agency Should Be Automating

The General Outline If you are looking for just a quick listing of the main procedures to include in your agency procedural manual, then this is the worksheet for you. The General Outline is the total listing of 101 procedures for Bonds, Commercial Lines, Crop/Farm, Life-Health-Employee Benefits, and Personal Lines.

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