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AGENCYLEDGE OPERATIONAL TEMPLATE

OFFSHORE CSR 90-DAY ONBOARDING & SOP HANDOFF CHECKLIST

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AGENCY NAME: _____

OFFSHORE CSR NAME: _____

START DATE: _____

ASSIGNED OPERATIONS LEAD / MENTOR: _____

PHASE 1: TECHNICAL PROVISIONING & SECURITY (DAYS 1 – 7)

- ☐ Dedicated Agency Email Provisioned (e.g., name@agencydomain.com)
- ☐ Password Manager / 1Password / LastPass Seat Assigned (No raw credentials shared)
- ☐ Agency Management System (AMS360 / EZLynx / Applied Epic) User Profile Created
 - Role Permissions set to "Restricted / Non-Discretionary Servicing"
- ☐ VOIP Phone & Softphone Extension Configured (Internal routing only / outbound caller ID)
- ☐ Internal Communication Channels Joined (#general, #csr-operations, #daily-standup)
- ☐ Loom Account Created for SOP Video Handoffs
- ☐ E&O Compliance Acknowledgment Signed (No unauthorized policy binding / advisory tasks)

PHASE 2: LOW-RISK BACK-OFFICE EXECUTION (DAYS 8 – 30)

[] Policy Document Indexing & Verification:

- Cross-referencing carrier dec sheets against AMS binder details

[] Standard Certificate of Insurance (COI / ACORD 25) Generation:

- Master certificate templates review & automated issuance

[] Prior Carrier Loss Run Requests:

- Standardized broker of record / carrier claims history retrieval

[] Non-Premium Endorsement Processing:

- Mortgagee / Lienholder updates & address changes logged in AMS

[] Daily 10-Minute Morning Standup with Operations Lead

PHASE 3: REMARKETING & RENEWAL PACKAGING (DAYS 31 – 60)

[] Automated Comparative Rating Workflow (45 Days Prior to Renewal Expiration)

[] Schedule of Insurance & Coverage Summary Assembly

[] Commercial Vehicle & Driver List Audits

[] Weekly File Quality & AMS Note Logging Audit (Random sample of 10 files)

[] Milestone Review: 30-Day Performance & SLA Assessment

PHASE 4: FULL AUTONOMY & ADVANCED SERVICING (DAYS 61 – 90)

[] Direct Email Communication with Domestic Clients on Non-Discretionary Inquiries

[] Policy Cancellation & Non-Pay Notice Triage

[] Cross-Sell / Account Rounding Opportunity Tagging for Domestic Licensed Producers

[] 90-Day Full Operational Review & Long-Term KPI Baseline Established

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