

ABOUT US



**TRUSTED
PARTNERS
SOLUTIONS**



YOUR NEARSHORE PARTNER!



WE'RE TRUSTED PARTNERS SOLUTIONS

We are professionals committed to offering service solutions. Becoming a strategic ally of our clients, providing solutions tailored to their needs, and serving as support in achieving their strategic objectives



We promote the sustainable growth of our clients, through exceptional service, becoming their main ally in achieving their business objectives.



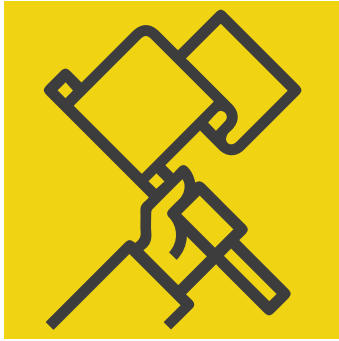
WE ARE LIKE AN OWL



OUR OWL REPRESENTS:
COURAGE AND PROTECTION
INDEPENDENT THINKING
OBSERVANT LISTENING
POWERFUL INTUITION
WISDOM

Owls sight might be so sensitive as to enable an owl to hunt and catch prey in complete darkness.

Just like us, always prepared to solve any problem that the client has, even if the solution is difficult to see



OUR MISSION

Provide service solutions with excellence, through a professional team focused on maximizing the efficiency of its operations, which allows us to promote the growth of our clients and become their main strategic ally.



VISION

To be recognized as a customer service company for insurance brokers in the Western United States, being leaders in outsourcing in that market.



WE'RE TRUSTED PARTNERS SOLUTIONS

Our Solutions

We establish a connection with our clients with a view to improving operational quality, customizing every detail of the process and giving them the importance, they require.

Carrying out the processes with the best quality, achieving the sum of outstanding actions and giving better results than expected, this is our most notable feature, and it is our own personal goal



OUTSOURCING INSURANCE CUSTOMER SERVICES

1 PENDING CANCELLATIONS

We know that requires a great effort in getting new business policies on the books, but once you do, it can be hard to keep clients insured with your company. Our goal is to make live contact as soon as possible. We want to let the insured know that we are there for them and to ensure we keep the policy



REINSTATEMENTS

Whether it is reinstating with a lapse in coverage or no lapse, our trained insurance professionals understand the requirements needed to reinstate a policy, we can follow up to make sure the policy is back to your books and that all of the necessary documentation and attachments are included.



YOU CAN FEEL SAFE WITH US

QUALITY CONTROL

We understand that accuracy is essential, but in the insurance industry it's key in avoiding Errors & Omissions (E&O) claims. Policies need to be double-checked. Employees are trained to check policies based on the checklist your company provides. We'll be your second eyes



PAYMENT PROCCESSING

Payments are such a big part of the tasks of an insurance company. It's a simple task, yet it is extremely time-consuming. Our staff is trained on the different payment plans offered and what information needs to be collected to process these payments



RENEWAL PROCESSING

A well-thought renewal process is critical to the customer journey and helps improve retention. Renewals are the most profitable segment of your business. We understand how important renewals are. We can help you get ahead of your renewals by updating client information based on their requests and inspection reviews.



WE CAN KEEP TRACK OF ALL YOUR CUSTOMERS NEEDS

Endorsement Processing

Processing Endorsements for Insureds is a core function of any insurance operation. Our staff are highly skilled in processing your changes that are submitted via online request, email, snail mail and fax. These tasks are necessary to keep clients satisfied and properly insured. Trusted Partners will do the heavy lifting, so your team can remain focused on providing exceptional guidance and customer service.



Notice of Cancellation

We all have those clients that need multiple follow-ups to obtain their pending supporting documents. They don't always send us what we need, and it leads us to begin the dreaded Notice of Cancellation (NOC) process and follow up. Here at Trusted Partners, we can tackle this for you. Our staff can start the Notice of Cancellation

VIRTUAL ASSISTANT

We provide you with an independent contractor who provides services to your team while operating outside your office. Your VA can access the necessary planning documents, such a shared calendar, remotely.

Typical tasks a VA might perform include scheduling appointments, making phone calls, making travel arrangements, and managing email accounts.

The specific duties vary according to the needs of the client .



ONBOARDING

At Trusted Partners Solutions we strive to provide excellent service. We understand that a call is an important touch point of your hard-earned customers. We focus on providing the possible experience that make them feel good about your company, because we aspire to become you're partners.



PROJECTED TIMELINE

Week 1

- Onboarding call identifying key contacts on Operations and Technology
- Procedural review (Overview of business processes) Begin training development and procedure documentation
- Begin IT assessment.

Week 2

- Complete training development
- Hire and/or Identify staff
- Develop audit procedures
- Finalize IT assessment

Week 3

- Finalize staff selection
- Training review

Week 4

- Begin training staff
- Staff Introduction with their new team,

Week 5

- Outbound calls & Queue Integration

Week 6:

- Queue Integration & Complete training development

Week 7

- Go Live as full integrated staff

RESPONSIBILITIES FOR SUCCESSFUL TRANSITIONS OF TASKS INCLUDE:



1

Ensure all key members of the team are fully onboard and support the transition.

2

Identify leader(s) as main point of contact for each task and ensure availability to train, and provide ongoing support, including IT.

3

Maintain scheduled onboarding timeline objectives as best as possible.

4

Keep expectations reasonable, establish and communicate standards and key performance indicators.

5

Continually pushing to add/ or Volume to keep remote staff engaged and working at a full capacity, with the goal of expanding the remote staff team in the long run.

REQUIREMENTS



Training

The following training steps will need to take place before we Go Live.

- Current processes need to be recorded in detail and delivered to TP Solutions (this could be performed on the 1st week through a web app like Webex)
- Trusted Partners Solutions will review and assist with the development of training documents, as needed.
- Training documents and videos to be shared and studied by reps before live training.
- Client will conduct a live training session with the reps prior to going live and answer any questions during training session.
- Access to your CRM, webs from companies and your phone system, to get calls.

Meeting Frequency – Project status meetings will be held frequently as the representatives start working on tasks and become less frequent as the representative are fully trained.

- First Month: weekly touch point calls to discuss project status.
- Month 2 - 4: bi-monthly meetings.
- Month 5 and forward: monthly meetings to discuss staff productivity, future tasks, and staff capacity.

Staff Projections

Team Lead is required once the staff count reaches 8, subsequent Team Leads are required with additional 8 staff.

