



SureBridge Operations Update

As you know, over the past several months SureBridge has implemented a number of improvements to address the challenges we have faced this past year that have impacted customer and agent services. Provided below is information on recent updates and future enhancements that will help us continue to improve our service to you and your customers.

What We've Accomplished

IT Enhancements

Billing	<ul style="list-style-type: none"> • Improved refund process • Improved premium transaction monitoring • Future: additional updates to refund process • Future: additional updates to premium transaction monitoring
Policy Administration	<ul style="list-style-type: none"> • Enhanced ID card • Improved customer letters • Enhanced processing for returned mail • Addressed email and voicemail message backlog • Coming in May: Reconciliation of policy print and letters to verify customer receipt • Coming in May: Ability to send customers email attachments
Customer & Agent Portals	<ul style="list-style-type: none"> • Added self-service billing changes capability • Added capability for single transaction for multiple policies on a combined bill • Added additional correspondence • Automated processing of Facets Self Service tool cancellations • Post-May Update: Confirmation email to customer following a customer portal transaction
New Business & Underwriting	<ul style="list-style-type: none"> • Coming in May: Automation of eligibility assignments to allow for faster issue rate and eliminate undue delays for the customer
Claims Processing	<ul style="list-style-type: none"> • Coming in May: Per Cause Accumulator functionality to improve claim processing efficiency • Coming in May: Per Plan Year Accumulator Functionality

Customer Service Enhancements

People	<ul style="list-style-type: none">• Added 60+ new Customer Service Representatives (CSRs) and 14 new screeners since August• Created triage queue of tenured CSRs to address complex questions• March: ## new CSRs
Telephones	<ul style="list-style-type: none">• Created Concierge queue for top 200 agents with average hold time of only 1 min• Created an interim voicemail for cancellations, policy prints, ID cards, and address changes to provide customers with an option not to hold (no longer in use, all calls are once again being answered directly by a CSR)• Created customer direct route option to speak to customer service representative• Installed screeners to direct calls more efficiently
Processes	<ul style="list-style-type: none">• Deployed MySureBridgeInsurance.com customer portal for migrated policies/customers.• Re-opened MyPortal.SureBridgeInsurance.com self-Service tool• Leveraged Sales Admin's to assist with voicemail backlog (completed in Feb)

Thank you for your continued patience and support during this time of transition.

Questions? Contact Producer Support

(888) 797-4447

Hours: 8:00 a.m. to 5:00 p.m. CST Monday – Friday

ProducerSupport@SureBridgeInsurance.com