Welcome Program Process Overview

What is the Customer Welcome Program?

The goal of the program, which began in 2004, is to enhance the Travelers customer experience for your clients. In fact, a recent Travelers study showed retention improved with customers that we called to welcome to the company, so we are pleased to be offering this new program in your state.

How does it work?

Travelers will contact selected new automobile customers 4-10 business days after the policy is issued. The purpose of the call is to:

- **Welcome** and thank customers for choosing Travelers
- **Validate** basic information such as name, address, date of birth
- **Confirm** all applicable credits and surcharges have been applied such as Defensive Driver
How does the Customer Welcome Program work?

**Welcome Program Contact Flow**

- Day 1
  - NB Policy Load

- Day 4 – 10
  - New Customer Postcard Mailed

- Day 11 – 17
  - 1st Reminder Call to Customer

- Day 18 – 24
  - Reminder Letter Mailed to Customer

- Day 25 – 31
  - 2nd Reminder Call to Customer

- Day 26 – 59
  - Final Letter Mailed to Customer

- Day 32+
  - No Contact

**Welcome Program Interview**

- **Create a Positive Customer Experience**
  - ✓ Anticipate customer needs and questions
  - ✓ Build customer trust
  - ✓ Partnership with Agents

- **Verify Information**
  - ✓ Name, Address, DOB and phone number
  - ✓ Driver Information
  - ✓ Driving History
  - ✓ Vehicle Information
  - ✓ Promote EFT

- **Communicate Premium Changes (if applicable)**
  - ✓ If the policy has an increase in premium, agents are provided advanced notice via faxed copy; customers receive a mailed copy
Re: Your New Personal Automobile Insurance Policy

Reference Number: RNYNY 12345
(Numero De Referncia)

Dear Policyholder:

Welcome to Travelers! We value your business and hope to serve you for years to come.

We need to speak with you to ensure that the information on your new auto policy is correct. There are a few items that we need to verify so that we may continue your coverage.

Please call as soon as possible. (Por favor Llame) 1-866-873-8672

Monday – Thursday: 8:30am - 8:00pm ET
Friday: 8:30am - 6:00pm ET
NEW AUTO POLICY REVIEW

Hello this is Bob from Travelers Insurance.
I am calling with a message for <name>.

Welcome to Travelers and thank you for placing your automobile insurance with us.
The reason that we are trying to speak with you is to confirm some questions we have about your information.
If you are able to complete our underwriting interview which should take 5 to 10 minutes, press 1. Or if this is a bad time, press 2.

<p>press 1</p>
Please provide us with reference number.
Please hold while we connect you...
This should only take a few moments.

<p>press 2</p>
Please call us back at 1-866-873-8672. Our office hours are 8:30 am to 8:00 pm Eastern Time Monday through Thursday. And 8:30 am to 6:00 pm Eastern Time on Friday. When calling, please provide us with your reference number.

To repeat this message, press 9
Thank you for choosing Travelers. Goodbye.

* Spanish-language message indicates press 1 to hear this message in Spanish
Welcome Program Customer Correspondence Example
Reminder Letter

1-866-873-8672
Monday – Thursday: 8:30 am - 8:00 pm ET
Friday: 8:30 am - 6:00 pm ET

IMPORTANT: Your response is needed

Dear (Name):
We have been trying to contact you about your new auto policy. We need to speak with you to make sure that the information on your policy is correct. There are a few items that we need to verify so that we may continue your coverage.

Please call us by mm/dd/yyyy

• we will clarify some of the information on your policy
• it will only take a few minutes of your time

Please make sure that we speak to you before **/**/****, or we may have to cancel your policy.

Thank you for your understanding.