

Scoring Form for All Quarters of Each Policy Year				
BROKER'S SERVICE LEVEL				
CATEGORIES	HR - Rating Score (1-Being very poor and 5 - Excellent)	Maximum Score	% of Total Score	Comments
1. Our Service Administration (15%)				
i. Issuance of Policy Documents / Billing	4	5	12%	
ii. Accuracy of Policy Document / Billing	4	5		
iii. Promptness in the follow-up on premium payment	4	5		
iv. Overall Satisfaction of Service Administration	12	15		
2. Our Claims Administration (15%)				
i. Speediness of settlement of reimbursement of claims	4	5	12%	
ii. Accuracy of claims assessment	4	5		
iii. Follow-up with employees with missing claim documents	4	5		
iv. Overall satisfaction of Claim Administration	12	15		
3. Customer Service (20%)				
i. Professionalism of customer service personnel	3	5	16%	
ii. Products and claims knowledge of our customer service personnel	4	5		
iii. Response to queries	5	5		
iv. Facilitation support with third party medical provider	4	5		
iv. Overall satisfaction	16	20		
4. Presentation (10%)				
i. Monthly reports (By 3rd week of the following month)	5	5	8%	
ii. Quarterly reports (By 4th week of the following month)	3	5		
iii. Overall satisfaction of Staff Presentation	8	10		
5. Staff Communication Handbook (10%)				
i. Comprehensiveness of the Handbook	4	5	7%	
ii. Clarity of the Staff Handbook	3	5		
iii. Overall satisfaction of Staff Communication Handbook	7	10		

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6. Renewal Review (30%)				
i. Pre Renewal Meeting: - August - September - Plan the renewal strategies in - propose enhancements - claims review - provide non-binding renewal terms	25	30	25%	
ii. Remarketing Exercise - September to October - Obtain quotes from other insurers to benchmark against renewal terms - Present and recommend renewal proposal				
iv. Overall satisfaction of Renewal Review	25	30		
Overall satisfaction with Inspro		100	80%	