

Policy renewal tracking and outreach

Automatically tracks upcoming policy renewals and executes personalized outreach campaigns to customers based on renewal timeline and risk factors. Reduces manual follow-up work and increases renewal rates through timely, targeted communications.

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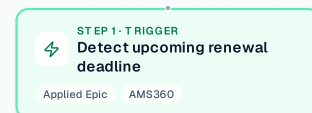


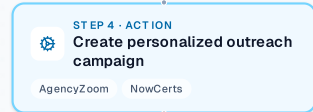
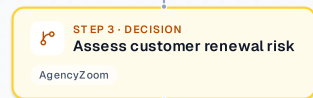
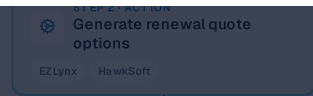
WORKFLOW TRIGGER

Policy renewal date is 90 days away

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Detect upcoming renewal deadline

System automatically identifies policies with renewal dates approaching within 90 days. Pulls policy details, customer information, and renewal history from the agency management system.

2

 ACTION

Generate renewal quote options

Creates updated policy quotes with current rates and coverage options. Compares existing coverage with new market options and identifies potential savings or coverage improvements.

EZLynx

HawkSoft

3

 DECISION

Assess customer renewal risk

Evaluates customer's likelihood to renew based on claims history, payment patterns, and previous interactions. Routes high-risk customers to priority outreach sequence.

AgencyZoom

4

 ACTION

Create personalized outreach campaign

Generates customized renewal communications including email sequences, SMS reminders, and call scripts based on customer risk level. Schedules delivery at optimal times for each customer segment.

AgencyZoom

NowCerts

5

 ACTION

Execute multi-channel communications

AI Business OS

Automatically sends renewal notices, quotes, and reminders via email, SMS, and mail. Tracks customer engagement and response rates across all channels.

AgencyZoom

EZLynx

6

 ACTION

Schedule agent follow-up

Creates tasks for agents to personally contact non-responsive customers or those flagged as high-value. Prioritizes outreach based on policy value and renewal probability.

Applied Epic

HawkSoft

7

 OUTPUT

Generate renewal tracking report

Produces comprehensive dashboard showing renewal pipeline status, response rates by communication channel, and projected retention rates. Updates agency management system with all customer interactions and outcomes.

AMS360

AgencyZoom



Outputs

AI Business OS

- Automated renewal quotes delivered to customers
- Prioritized agent task list for high-risk renewals
- Real-time renewal pipeline dashboard



Key Metrics

- Policy renewal rate percentage
- Average days to renewal completion
- Customer response rate by communication channel



Tools & Integrations

- Applied Epic
- AMS360
- EZLynx
- HawkSoft
- AgencyZoom
- NowCerts

AI Business OS

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