

Steve Yamane

Subject: FW: Agent's Vacation Request for Backup Support

From: Steve Yamane

Sent: Monday, March 24, 2008 2:29 PM

To: Atlas - Oahu Agents

Cc: Atlas - Management; Sharon Hodson; Atlas - Business Development

Subject: Agent's Vacation Request for Backup Support

To: Agents

Re: Independent Agent Vacation Procedure

In our effort to formalize the procedure for providing backup support to independent agents when they are on vacation, management worked with the Producer's Council to develop the attached procedure.

1. Independent Agent Vacation Procedure – attached
2. Sample verbiage from agent to Steve Yamane notifying when he/she will be going on vacation:
 - *"I (agent) will be on vacation from _____ to _____. Please have Atlas staff provide backup support for my clients. My emergency contact number is 808-xxx-xxxx."*
3. Sample verbiage from Steve Yamane to Staff informing them of agents vacation and backup support
 - *"Agent XXXXX will be on vacation from _____ to _____. Please provide backup support for Agent XXXXX. Backup Support is defined as endorsement processing and answering basic client questions. Please let the client know that other request will be forwarded to the Agent and the Agent will address these issues as soon as he can. Please forward these other request to the Agent via email. As always, please assist client / agent with emergency situations. Please remember that all vacation requests for vacation support must flow through me (Steve Yamane). If an agent asks for vacation support, please tell them that these requests must flow through Business Development – Steve Yamane."*

Should you have any questions, please feel free to contact Sharon Hodson (x-8657), Steve Yamane (x-8723) or Guy Matsumoto (x-8713).

3/24/2008

INDEPENDENT AGENT VACATION PROCEDURE

1.0 Purpose

To formalize the procedure for providing backup support to independent agents when they are on vacation.

2.0 Scope

Applies to all independent agents working with the 1132 Bishop Street commercial lines staff and the 1132 Bishop Street independent agent personal lines staff.

3.0 Policy

Independent agents working with 1132 Bishop Street staff will request for backup vacation support in writing at least two weeks prior to the scheduled time out of the office. Vacation support will consist of endorsement processing and responses to basic client questions. No new business applications will be completed by Atlas staff as part of the support services. New business applications should be completed by the agent upon his return.

Independent agents can use this service for a reasonable number of vacation days per year (approximately two weeks). Atlas will eliminate this service for Agents that request support for an unreasonable number of vacation days. It is the agent's responsibility to check his or her voicemail regularly and also be available via cell phone.

4.0 Procedure

1. **Agent's Message to Clients** - While on vacation, the independent agent will leave a voicemail and email message similar to the following: I will be on vacation from ____ to _____. If your request or question can wait until I return, please contact me on or after _____. If you need immediate assistance, please call 533-8753 to reach a personal lines account Manager or ____ to reach your Commercial Lines Account Manager(s).
2. **Agent's Message to Business Development** - An independent agent going on vacation and requesting 1132 Bishop Street staff support will send an email to Steve Yamane (syamane@atlasinsurance.com). The email to Steve must include the following information: (1) starting and ending vacation date and (2) emergency phone number – preferably a cell phone.
3. **Business Development's Message to Atlas staff** – Business Development will send an email to the corresponding personal lines and commercial lines staff. The email will outline the name of the agent and the dates when the agent will require backup support. The email to staff will also include the following note, "All requests for vacation support must flow through Steve Yamane. If an agent requests backup vacation support directly, please inform them that these requests must flow through Steve.
4. Backup Support will be defined as endorsement processing and answering of basic client questions. Other requests from the insured will be forward to the agent via email or voicemail. As always, staff will help on emergency situations. The definition of Backup Support will be included in the email to staff.
5. Attached is a sample email from an agent to Business Development and a sample email from Business Development to staff.
6. Business Development will keep a log to track the number of days requested by each agent in each year. Business Development will review the log and notify Atlas management when any agent requests an unreasonable number of vacation support days.

5.0 Exemptions

No exemptions.

6.0 Effective Date

February 11, 2008

7.0 Policy Revisions

Atlas retains the right to make revisions and changes to this policy at any time.

