GUIDE TO THE PRE-QUOTE CALL

What? A pre-quote risk engineering call is required to complete every DMC submission.

Why? The call allows us to deepen our analysis of the prospect and start to explore where our services may be most beneficial for the potential customer.

How? Before each call is scheduled, the DMC risk engineer sends an agenda for the discussion that covers any missing or incomplete information from the submission and expands upon the data.

How can you help make the call a success?

- Complete the submission in full, and note to the client any missing or incomplete information that underwriting or the risk engineer may request after their initial file review.
- Provide the risk engineer's agenda to the insured as early as possible. If the client is unaware of the items we intend to discuss, they may not be able to provide necessary information.
- Obtain and supply the risk engineer with all requested documentation prior to the call. When our team can analyze the account's data beforehand, we can use the call to establish the relationship and create the best service plan to help reduce the client's cost of risk.

Baseline agenda categories:

Discussion items and materials requested will be customized based on each company and their unique submission and application. Additional documents and topics may be added specific to your client.

Submission Validation
Ensure all data is completed, updated, and clarified.

Driver Hiring Requirements
Driver statistics and hiring procedures.

Training and Coaching
Safety processes in place and future goals.

Technology Use and Plans
Current technology, equipment. and future plans.

Operational Overview
Operational review and any expected changes.

Claim Handling Criteria
Accident reporting procedures and any internal self-handling.