

F Y I Date
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F Y I

Inspector Tips and Tricks

Call H&S:

- If you are going to be out of the office on vacation or for any other reason, call and notify H&S.
- If you are on site and cannot complete an inspection or if the insured did not show up, call H&S before you leave the site.
- If you have an issue with LC360, don't get frustrated and waste a lot of time trying to figure it out, call H&S.
- If you have a technical question about an inspection or if you need some advice about an issue with an inspection, call H&S.

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Appointment Success

H&S has seen that inspectors that are successful at setting appointments do the following 4 things consistently.

1. Make 3 phone calls to the insured (giving a day or 2 between calls for the insured to respond).
2. If the insured does not respond, make a phone call to the agent to request assistance.
3. If the insured does not respond after the call to the agent, then call and/or email H&S to give status. And create a case note on the case in Loss Control 360.
4. Do all of these during the first 10 days, after being assign a new case.

Good Communication is Always Important

We are professional inspectors and we must always represent ourselves as professionals. Good communication is one key aspect of being professional.

1. Always be courteous, whether on the phone, in person, or by email.
2. Always be respectful to others when we communicate. This certainly means to respect the insured and the agent. But it also includes anyone else you may meet on the inspection, like a neighbor, or an employee of the insured.

Always properly identify yourself. Present your photo ID, offer a business card, and describe why you are contacting the insured in ways that the insured

understands. For example, say "Hello, my name is (your name). I am with H&S Loss Control Inspections. You have an insurance policy issued by (the insurance company name) through your insurance agent (the insurance agent name). Your insurance company has requested that H&S perform an inspection of your property as part of the conditions of your policy".

One more thing, **when you leave a phone message or send an email**, give the policy number. Giving the policy number will certainly assure the insured that you are legitimate and it provides the insured the information to understand why you are contacting them.

Special Care with an Agent

When speaking to an agent, be careful to avoid negative comments. Always give the insured benefit of the doubt. The insured is the agent's customer. The agent knows insured, and wrote the policy for the insured. For these reasons, the agent will

always take side of insured. This is when you must use your most professional communication skills. If the agent gets upset, it is never good for H&S and the inspector.