

F Y I Date

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**F Y I**

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## **Inspector Tips and Tricks**

- **Never let your Voicemail box become full.** Your voicemail is the way insureds/contacts and H&S answer your questions. Empty your voicemail box regularly.
- **Be sure to ASK the contact for answers about the roof age and the system updates.** Always be professional, but press them on these critical issues. Sometimes asking if there is a maintenance person with whom you could speak is a way to get the answers you need.
- **The Pay Plan Schedule is in the LC360 "My Pay Checks" tab drop down menu and in the "Training" tab, along with past FYI Bulletins and other useful resources.**
- **The description areas of the forms are intended to be brief. But always write enough to state all of your important observations. Remember, you are the "eyes and ears" of the underwriters.**
- **Never miss appointments. It makes all the rest of your work harder.**

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### **Identify Yourself to the Insured**

It is so important that you follow H&S policy to properly identify yourself to the insured, the agent, and any other contact involved with the inspection.

A proper identification is a great way to start your phone conversations and it's a great way to start your inspections. Also, because there are so many scams and scammers in the world today, a proper introduction will prevent undue suspicion and confusion with the contact.

When introducing yourself to the contact at the property there are five H&S policy requirements.

1. Always have your H&S ID badge displayed on your person.
2. Always offer your H&S business card to the contact.
3. Always introduce yourself as an "H&S Inspector".  
Remember: as an Independent Contractor, you are performing work for H&S, not for your own company, and you are not there to advertise your own company/services. The contact is often uncertain about the inspection, so introducing one more company name will only add to their confusion.
4. Always state the name of the insurance company (our customer). Let the contact know you are there to inspect the property for Preferred Mutual, Seneca Insurance, Specialty Insurance, etc.
5. Lastly, bring your paperwork. Be prepared in case the contact wants to know which address or what policy number is being inspected.

The on-site introduction should go something like this:

*"Hello. My name is Mary Smith. I am an inspector with H&S Loss Control Inspections, here to perform an inspection for XYZ Insurance Company."*

When making your call to set up the appointment or leaving a voicemail, similar rules apply. State your name and that you are an inspector with H&S Loss Control Inspections. Then say that you would like to set an appointment to inspect their property for the customer (using the formal customer name).

A phone introduction should go something like this:

*"Hello. My name is Mary Smith. I am an inspector with H&S Loss Control Inspections. XYZ Insurance has asked H&S to perform an inspection of your property and I would like to make an appointment with you for the 9th at 3pm."*