

Workflow Process

**ACQUIRING NEW BUSINESS-BDU
(MOTOR)**

Doc No.	AIB-WP-BDU-001
Rev.	1
Date	01/08/2019
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Interaction	Control/Activities	Records
<pre> graph TD Start([Start]) --> Step1[1. Establish] Step1 --> Step2[2. Appointment with Prospect] Step2 --> Step3[3. Obtain existing policy details] Step3 --> Step4{{4. Prepare Placement Slips}} Step4 --> Step5[5. Send Placement Slips to prospect] Step5 --> Step6[6. Client File to be given to Servicing Head] Step6 --> Step7[Assist Servicing Head in servicing and collection of premium] Step7 --> End([End]) </pre>	<p>1. Establish contact.</p>	
	<p>2. Make Appointment/Call prospect.</p>	
	<p>3. For new vehicle (unregistered), obtain Invoice/Purchase Order/details/Permits, of the vehicle from salesman/prospect and copy of prospect's other policy if he/she wish to transfer the No Claim Bonus/Discount.</p> <p>For existing vehicle, obtain existing policy / renewal notice, copy of JPJ card.</p>	<ul style="list-style-type: none"> • Invoice/P.O • Copy of prospects policy • Existing policy / Renewal Notice • JPJ Card
	<p>4. With information obtained, prepare Placement Slips (Motor is subject to Motor Tariff).</p> <p>Persons who prepare the Placement Slips are responsible for checking the details before sending it to prospect.</p> <p><u>Note:</u> Ensure that the brokerage amount is not shown to prospect.</p>	<ul style="list-style-type: none"> • Placement Slips
	<p>5. Send Placement Slip via fax/email to prospect for approval/ acceptance.</p> <p>Follow up with prospect via phone call or email.</p>	<ul style="list-style-type: none"> • Placement Slips • Fax/Email
	<p>6. Once prospect has confirmed to effect cover, pass the Client file to Servicing Head to issue Debit Note.</p> <p>Assist Servicing Head in maintaining relationship with Client and assisting in collection of premium.</p> <p><u>Note:</u> Client can confirm cover via email / call or fax</p>	



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Note: The workflow exclude international business.


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