



STRATEGIC APPROACH TO CLIENT SERVICE

For over eighty years, we've been focused on our clients and aligning our service to their needs. You have our commitment that we are by your side at every turn. Whether we are helping you with a claim, answering compliance questions or simply keeping you up to date on industry trends, we are here to make your life easier. Our four-phase approach, coupled with year-round service, goes beyond the basic program design and renewal strategy. The end goal is helping you operate a successful business. The peace of mind that comes from knowing Hylant has your insurance and risk management aligned with your goals helps you do just that.

PHASE 1: DISCOVERY

Getting to know your short and long-term goals is critical to our success and yours. That starts by listening and understanding your needs, challenges and past trends. Our modeling and benchmarking tools come in handy in our discovery phase.

Outcomes

- Clear, prioritized objectives and mutually agreed upon goals and responsibilities

PHASE 2: ASSESSMENT

After listening, we roll-up our sleeves to assess your current programs, determining the true cost of risk. Our analysis helps identify the tailored recommendation and develop personalized outcome-focused plans designed to support your goals and protect from potential risks.

Outcomes

- Easy to understand plan and timeline that guide the process and can inform others in your organization

PHASE 3: IMPLEMENTATION

Leveraging our carrier partner relationships to secure the ideal program at the best rate is a big part of what we do. Equally important is the worry-free implementation and execution of the policies you expect and rely upon.

Outcomes

- Final recommendations, negotiated rates and weekly updates to keep you informed throughout the implementation

PHASE 4: STEWARDSHIP

Pausing to reflect on successes and opportunities for improvement ensure that we remain aligned with your team and your business. Typically, our annual stewardship review occurs within 45-60 days post renewal.

Outcomes

- Summarization of decisions, outcomes and opportunities to improve future program design and our working relationship





PROPERTY & CASUALTY SERVICE TIMELINE

No.	Action	Number of Days
PHASE I. PROGRAM MARKETING		
1	Hylant team preliminary renewal strategy planning session	150 Days prior to Renewal
2	Data Gathering System Ready for Client	120 Days prior to Renewal
3	Roll Out Data Gathering System to Client & Subsidiaries	115 Days prior to Renewal
4	Develop Marketing Objective with Client	110 Days prior to Renewal
5	Data Gathering System updated by each subsidiary and reviewed by Client	90 Days prior to Renewal
6	Prepare Insurance Submission for insurance company(ies)	75 Days prior to Renewal
7	Review Insurance Submission with Client	75 Days prior to Renewal
8	Submit Insurance Submission to insurance company(ies)	70 Days prior to Renewal
9	Inspections completed by insurance company(ies)	
10	Respond to underwriter inquiries	
11	Proposals received from insurance company(ies)	40 Days prior to Renewal
12	Analyze proposals and complete cost-benefit analysis	26 Days prior to Renewal
13	Prepare Proposal to include Loss Control Service Plan and Claims Service Plan	26 Days prior to Renewal
14	Presentation of Proposal to Client	26 Days prior to Renewal
PHASE II. PROGRAM IMPLEMENTATION		
15	Renewal decision by Client	20 Days prior to Renewal
16	Finalize details with insurance company(ies)	7 Days prior to Renewal
17	Assign claims/loss control coordinators/safety review	7 Days prior to Renewal
18	Administer insurance program (ie.Binder/Certificates of Insurance, etc...)	7 Days prior to Renewal
19	Preparation of billing allocations/invoice	5 Days prior to Renewal
20	Fee Proposal / Stewardship Report / Renewal Evaluation / Relationship Confirm	31 Days after Renewal
TARGET ANNIVERSARY DATE		
26	Deliver policies to Client	120 Days after Renewal
27	Review/Process final audits	Within 7 days of receipt
28	Claims Review and Loss Ratio Analysis	130 Days after Renewal
29	Modmaster Promulgation and/or Analysis	130 Days after Renewal

Client
 Hylant
 Carrier
 Collaboration



EMPLOYEE BENEFITS SERVICE TIMELINE

Assumes January 1 plan effective

No.	Action	General Timeframe
1	Post Renewal Audit Review	30 Days post renewal
2	Annual Stewardship & Planning Meeting	45 - 60 Days post renewal
3	Health Strategies Discussion	60 - 90 Days post renewal
4	Pre-Renewal Meeting	120 Days prior to renewal
5	Benefits plan marketing/renewal negotiations	100 Days prior to renewal
6	Renewal Meeting and Final Carrier Negotiations	95 Days prior to renewal
7	Final Decision	60 - 75 Days prior to renewal
8	Open Enrollment	60 - 75 Days prior to renewal
9	Implementation/Change Paperwork Submitted	45 Days prior to renewal
10	Enrollment confirmation and data review	30 Days prior to renewal

Client
 Hylant
 Collaboration