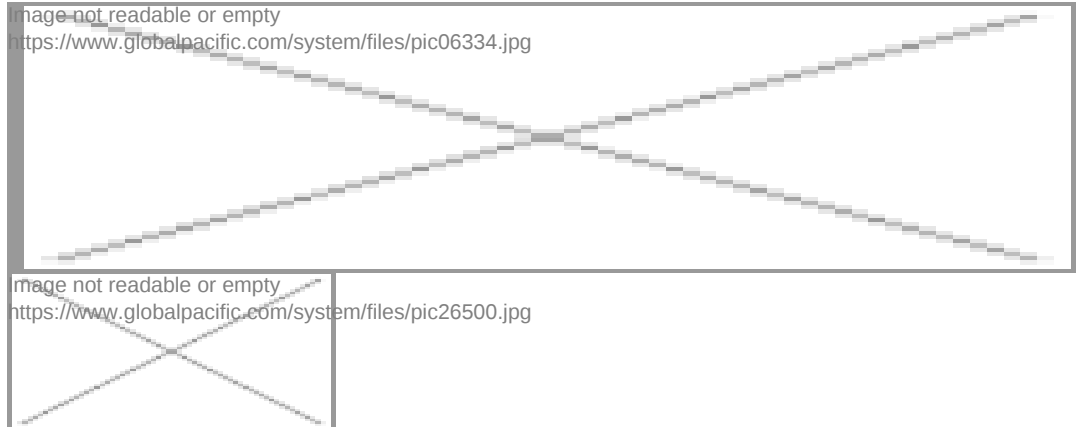


Customer Service Improvements

Submitted by Josh on June 20, 2014 - 9:14am

Customer Service launches several initiatives to improve operations



The Customer Service Department is delighted to announce the launch of new initiatives that will optimize the way you do business and allow us to deliver a higher level of service to our valued clients and members.

These initiatives are outlined below. We will provide regular updates on the status of each initiative and inform you of any actions you may be required to take as we move toward full implementation. Support and training tools will also be provided to make each transition as seamless as possible.

Electronic Copies of Client Documents

Launched last March, the new Client Documents application on Webi features electronic versions of several commonly used client documents, giving you quick and easy access to the documents you previously had to request from Customer Contact Centres. This gives you the power to serve your clients directly and in a timely manner.

We will continue to update you as we add more documents to this application.

Activity transfer for SOLO Disability Products

Starting June 30, 2014, the Customer Contact Centre, Individual Insurance, will become your go-to source for all SOLO Disability products queries. The Creditor and Direct Insurance Division will take care of claims processing. This solution will allow us to process requests in a more efficient way.

A New Platform to Track Pending Business

On September 14, 2014, we are launching a new, automated platform to track Pending Business. All advisors

will be required to use this new platform, which will provide a consolidated view of all communications for each client's file and timely notifications for every required action or decision from the Underwriting Department. You will be required to log onto the new Communication Profile link that will be posted on Webi on September 7, 2014, to note your communications preferences for receiving alerts and notifications. We will send you a reminder to update your preferences closer to the launch date.

Electronic Submission of Client Applications Using DSign

Say goodbye to mailing delays and incomplete applications and say hello to electronic efficiency with DSign.

Launching in early 2015, DSign is a secure and efficient way to complete and submit your clients' applications online. This user-friendly tool will be used for the majority of our products. DSign will adapt the application questions based on the product you select and the answers your clients provide. Required information will be clearly identified and colour indicators will alert you if a section contains errors or is missing information. When an application is complete, add your electronic signature and DSign will send it directly to the New Business department. This will reduce processing times significantly. DSign will be available on Webi and you will also have access to an offline version for your computer.

Requirements

In anticipation, and to take maximum advantage of these new improvements, each selling advisor will need:

- A user ID for our extranet (www.webi.ca)
- A unique agent code

For advisors currently working within a licensed corporate producer group, each advisor actively making Desjardins sales will need in future to be assigned a distinct agent code. Please rest assured this will affect neither the payment of commissions nor the ownership of client information for corporations with multiple producers. For advisors within corporate producer groups who already currently operate with distinct agent codes, or for currently contracted individual personal and corporate advisors, there are no changes required.

If you have any questions about the status or structure of your current Desjardins contract, would like to request changes to the current contract structure in anticipation of upcoming changes, or if you require a pre-contract code in support of your first Desjardins sale, please contact our Sales Compensation call centre at 1-877-877-2172. To sign-up or create a User ID for Webi, please contact Merchandising Technology at 1-800-461-3914 or mtsupport@dfs.ca

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