

Proformex

Best Practices



1 Assign a dedicated resource committed to learning and using Proformex

2 Maximize Onboarding & Training Sessions

- Save shared guides and resources for future reference

3 Setup Notifications

- Recommended to “watch” key reports:
 - Upcoming Premium Due Dates
 - Upcoming Anniversaries
 - Term Period Ends within 90 Days
 - Conversion Period Ends within 90 Days

4 Implement internal workflows to manage and maintain your book of business in Proformex

- Upon receiving alerts, stay in touch with clients using external templated outreach emails
- Ensure new business gets added on a regular cadence – your CSM is on standby to assist

5 Monitor Document Requests

- Follow up with carriers as necessary to ensure you’re receiving statements and illustrations

Leverage your Customer Success Manager to fully maximize Proformex for your needs