



Allsure

Learner Guide

MUTUAL & FEDERAL

PROTECTING WHAT'S IMPORTANT TO YOU SINCE 1851

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Workshop Outcomes

Welcome to the Allsure Product Training workshop.

At the end of this workshop, it is expected that you will be able to:

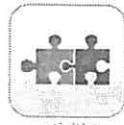
- Define all the Allsure Product offerings.
- Establish who we insure for each of the Allsure Product offerings.
- Establish what we insure on each of the Allsure Product offerings.
- Identify what we do not insure (the exclusions to the policy) under each of the Allsure Product offerings.
- Understand the relevant underwriting rules for each of the Allsure Product offerings.
- Determine the impact of the underwriting rules on each of the Allsure Product offerings in real-life scenarios.
- Discuss additional new sections, SASRIA and the value-added services offered by the Allsure Product.

Icons used in this Learner Guide



learning outcomes

Learning outcomes indicate what you will learn.



activities

Learning activities will assist you in understanding the topic better. These are all based on scenarios.



notes

You will have space to write your own notes.



summary

The summary will indicate all the important points of the learning unit.



remember

This indicates a very important aspect of the learning.



Certain words have been explained in further detail.

FAIS

Mutual & Federal falls within the Financial Advisory and Intermediary Services Act 37 of 2002, both as a product supplier and as a financial services provider. All representatives in the operational areas who advise clients should therefore comply with the Act. Furthermore, the Act requires that key individuals be identified to manage and oversee the business of the financial services provider. Key individuals should therefore also comply with the "fit-and-proper" requirements of the legislation.

Learning Unit 1: Background



Learning Outcomes

Learning outcomes

After completing Learning Unit 1, the learner should have:

- An overview of the PLCC offerings.
- Information about the Inbound Call Centre Services.
- Information about the Inbound Mail Centre Services.

Introduction to the PLCC offerings

Our Personal Lines Contact Centre (PLCC) consists of an Inbound Call Centre as well as a Back Office that deals with mail requests. The Call Centre is available between 8am and 5pm from Monday to Friday, excluding public holidays. The Back Office service level agreement is to action mail requests within 8 business hours of receiving the request. Both the Call Centre and Back Office are supported by the Quality Assurance team to ensure that the quality of our service delivery is maintained at a high standard. Further support comes in the form of the in-house process improvement team which identifies pitfalls in the service provided and improves the process to reduce bad service delivery.