

Masood Khan

From: Mark Fratkin
Sent: Friday, January 26, 2018 4:21 PM
Subject: Required Protocols For Everyone Regarding Sales
Importance: High

All,

Management discussed some recent sales hiccups that occurred over the last few months.

We wish to underscore that sales rules and protocols are in place to assure our greatest chance of success. Considering our smallest fees are actually quite large; even small missteps - or lack of collaboration - can potentially cause a significant reduction in a fee, or even worse - cause us to not secure an entire engagement.

Our sales team are seasoned professionals, proud of what they do and working rigorously honing their skills and their craft. Involvement with this elite team is an honor earned, and we are all part of it.

I'd like to memorialize some of our required protocols.

1. All sales emails get sent from our generic address, not your email address. They must be approved by me or a member of my staff
2. Immediately, upon contact by anyone regarding a potential sale or solicitation, you are required to reach out to me first by phone (or Steve or Gordon) before returning any calls or taking any action.
3. If you are contacted directly with an inbound call, take the call and do everything to move the sale forward and then immediately contact me, Gordon or Steve
4. If you receive an inbound email, please do not respond in any manner, please reach out to me Gordon or Steve.

Over the last few months, there have been times that these protocols have been forgotten. As a reminder, a condition of participating in sales commissions is strict adherence to these protocols.

Effective today, anyone not properly reporting loss information and solicitation efforts as described above will forfeit any sales commissions they may otherwise be entitled to on the loss. These rules apply to everyone...management, adjusters, sales team members, estimators, inventory specialist and support staff.

These protocols apply when operating in all territories including AIPNW

Year after year we have witnessed how the collaborative nature of the sales process works extremely well for our company and we must all take it as seriously as we do the professional integrity of our adjusting process.

Please keep these protocols and requirements in mind when handling sales issues.

Mark B. Fratkin
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"People don't care what you know until they know that you care"



Visit us on the web at www.greenspan-ai.com

Masood Khan

From: Mark Fratkin on behalf of Clay Gibson
Sent: Monday, April 2, 2018 9:03 AM
To: accountant; Bill Leggett; Bruce Tibert; Chris Glenister; Clay Gibson; Eric Metz; Eve Enriquez; Gary Johnson; Gordon Scott; Jamie Chiu; Jim Warren; Josh Scott; Ken Crown; Kenny Taylor; Mark Fratkin; Masood Khan; Paul Migdal; Sherry White; Taron Prakash; Allison Williams; Amanda Johnson; Bryan Fox; Daniel Jacobson; Daren Blevins; Heather Connell; inventory; Jaxson Peters; Jenny Schultz; Jimmy Woodward; Jody DuVall; Kevin Grace; Lisa Suchon; Rebecca Dalton; Wes Williams; Tim Larsen; Ven Senires
Cc: Gordon Scott; Steve Severaid; Jim Warren; Paul Migdal; Larry Pratt; Mark Fratkin
Subject: Adjuster Reminders

4TSLResend: 0;240;;0;10
4TSLID: A325A4537FEE455EAC9EC9438EB6C3D7.Oc.13.0
DeferredDeliveryTime: 1/1/4501 8:00:00 AM
4TSLFlags: 2

These reminders will come monthly. We will be adding items to this list as and when appropriate.

- It is a company policy that you are not to leave a client alone with a company representative
- Mark should never show as a cc on emails to ins companies, clients etc. Only a bcc as needed.
- NO CLAIM (WHICH MAY INCLUDE BUT NOT BE LIMITED TO THE SUBMISSION OF CONTRACTOR'S ESTIMATES) MAY BE SUBMITTED TO AN INSURANCE COMPANY AND/OR IT'S DULY APPOINTED REPRESENTATIVE WITHOUT THE WRITTEN CONSENT OF OUR CLIENTS. NO EXCEPTIONS!
- WHENEVER WE WRITE A LETTER REQUESTING SOMETHING FROM AN INSURANCE COMPANY AND/OR IT'S DULY APPOINTED REPRESENTATIVE, WE MUST FOLLOW-UP EVERY WEEK UNTIL WE RECEIVE A RESPONSE.
- If you feel an expense needs to be incurred that you intend to pass on to the client, YOU MUST GET WRITTEN PERMISSION AND ACKNOWLEDGEMENT FROM THE CLIENT that he/she is OK with paying these charges/expenses.
- Before assigning any building estimating job where our fee is UNDER 7%, please speak to Mark.
- You may not engage the services of an outside consultant, engineer, architect, specialist, etc. without permission from Clay, Paul or Mark. Once you receive permission, please confirm it in writing
- **WE DO NOT ACCEPT POST DATED CHECKS**
- We would ask that the adjuster ask the salesperson...every time...what the recommended appropriate dress is for the new client.