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40 Tasks Commonly Delegated to International Staffing

Administrative & Document Management

1. Upload and organize documents in Policy Center or shared agency folders for all lines of business.
2. Assign and review incoming emails from shared service inboxes, forwarding to the correct team member.
3. Assign and review missed calls and text messages.
4. Approve/disapprove time-off requests, manage employee records, and oversee timecards.
5. Prepare and update EOIs (Evidence of Insurance) for banks, clients, and outside carriers.
6. Review and follow up on missing documents for all policy types.
7. Handle undelivered mail triggers and update client information.
8. Prepare submissions for mileage, lienholder, address, and marital status updates for agent review and finalization.

Policy Maintenance & Carrier Communication

9. Process underwriting surveys, renewal triggers, and alerts from carriers.
10. Manage billing issues (e.g., card declines, returned payments, pending cancellations) for home, auto, commercial, flood, and earthquake accounts.
11. Coordinate with banks and mortgage companies on payments and documentation.
12. Track and follow up on non-renewals for all lines.
13. Set up initial billing for new commercial policies.
14. Follow up on pending documents or compliance requirements from carriers.
15. Reissue or update certificates of insurance for commercial clients.
16. Support commercial account audits with documentation and follow-up.
17. Process billing refunds and EFT requests.

Disclaimer: Always verify compliance with your state regulations and carrier guidelines before assigning any task to your international staff or virtual assistant. Skill Up Agency Assist is not responsible for any actions, omissions, or outcomes resulting from staff activities within your agency. Each agency assumes full responsibility for hiring, training, and supervision of its team members.



Lead Management & Marketing Support

18. Contact and qualify new leads by phone, internet, and social media.
19. Complete quote sheets with lead data.
20. Maintain updated lead logs and CRM records.
21. Assign leads to the correct agents or departments.
22. Send reminders and follow-ups to inactive leads.
23. Confirm contact details and coverage needs before passing to licensed agents.
24. Welcome new prospects via phone, email, or social media.
25. Review online quote requests from agency website, Yelp, and other sources, and assign for quoting.
26. Track and report marketing campaign performance.
27. Assign and monitor leads from recommendation engines or paid ads.

Client Communication & Follow-Up

28. Return missed calls from clients and prospects.
29. Provide non-binding policy status updates and reminders.
30. Follow up with clients on missing paperwork or pending actions.
31. Make welcome calls to new clients after policy issuance.
32. Follow up on special cases or service requests from agents.
33. Schedule meetings and coordinate follow-ups for executives and sales teams.

Executive & Project Assistance

34. Manage and coordinate executive calendars and meetings.
35. Track progress on key projects and prepare updates.
36. Assist with recruitment and onboarding (posting jobs, scheduling interviews, collecting documents).
37. Coordinate cross-department projects and communications.
38. Assist in organizing corporate events and internal trainings.
39. Prepare presentations, reports, and meeting materials.
40. Screen and prioritize emails or requests for leadership.

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