Top-of-the-line service for your customers, bottom line growth for your business.

Let us handle the servicing for you!

Your customers are the heart of your business. Servicing them takes time and money. With us, you have a partner with the expertise to take care of your customers just like you would. Giving you time to focus on winning new accounts and growing your business.

As you navigate the current market, consider taking advantage of our Policyholder Services (PHS) Center. **Use these handy tips** when transitioning your customers and maximize the benefits.

Learn more about the service center before you move business by scheduling a service center tour with your sales representative.

Get ready to unlock the full potential of our Policyholder Services Center. Your sales representative will arrange a meeting with one of our Service Operations leaders to explore the numerous benefits available. During this session, you'll learn how to effectively engage with us, manage changes seamlessly and transition your policies into the Policyholder Services Center.

We'll showcase the exclusive features available to you as an agent, as well as the advantages your customers can enjoy. Don't miss this opportunity to enhance your service offerings and elevate your customer experience.

Transition business into the service center with the Electronic Business Center (EBC).

To streamline the process of transitioning policies from a non-PHS code to a PHS code, use the **EBC** for submitting your change request. Here's how:

1. Navigate to the Service Customers section in the EBC and select Policy Changes.
2. Enter the first policy from your list that needs to be moved to PHS.
3. Under General Policy Changes, choose Agency Code.
4. Input the effective date for changing all policies to PHS.
5. Insert the new PHS agency code for these policies.
6. Indicate whether you have multiple policies to change. If you do, select 'Yes'.
7. Ensure you have an Excel spreadsheet listing all additional policies, which you can upload directly.

This approach ensures a smooth and efficient transition to the new PHS code.

Turn on download capabilities with your agency management system and The Hartford.

Discover the power of automation with **The Hartford Download Program**, available through the **EBC** . Simply navigate to Resources, then Guides and Training, to access all the information you need.

Our Download Program is designed to streamline your workflow by automatically updating policy transactions and commission statements in your system. This is perfect for agencies using a supported agency management system, ensuring you stay efficient and up to date with minimal effort.

The Hartford

Maximize the benefits of the service center.

To maximize the benefits of our service center, encourage your customers to reach out to us via My Account, click-to-chat on My Account or by phone.

By proactively sending a **co-brandable My Account promotional email**, you can show your customers how to contact us directly and remove yourself from being in the middle.

- **My Account**: Available 24/7
- **Click-to-chat** on **My Account**: 8:30 AM - 8 PM ET
- **Phone**: 866-467-8730 from 8 AM - 8 PM ET

We understand that customers may be used to emailing their agent for service requests. Help guide them to us by using this **co-brandable redirection email template**.

The **My Account Quick Guide** is helpful to understand what's available to your customers 24/7.

Get started today.

- Discuss your interest with your Small Business sales rep and set up a Policyholder Services Center tour. Your rep will guide you through the changes to position your agency for a successful transition so you can start using these services right away.

Stay connected to what your customers are doing.

There are several dashboards at your fingertips so you can **see what's happening** with your customers' activity.

- Explore the **Customer Activity Dashboard** to view the digital adoption of your book of business across all producer codes associated with your agency.
- Dive into the **Policy Activity Tab** to see all transactions processed in the past 20 days.
- Use **Certificate Transparency** to manage account recipients, check wording or edit delivery details with ease.
- Track endorsements effortlessly with the **Endorsement Tracker**, available through the **EBC or My Account**.

Stay ahead of the curve with these powerful tools at your fingertips.

Agent checklist for transitioning business to the service center.

	Activity	Support from The Hartford
☐	Activate service center producer code and sign contract.	Sales rep
☐	Turn on download capabilities with agency management system and The Hartford.	Self-enroll on the AMS dashboard
☐	Set up service center producer code as default in new business quoting system (ICON).	Agency Interface Services 877-322-4833 or chat
☐	Update EBC profile for activity alerts and reporting.	Sales rep
☐	Identify current business that needs to be moved into the service center using your agency management system data or a policy list.	Sales rep
☐	Document and train staff on internal policies regarding transitioning customers and agency handoffs to The Hartford.	Sales rep
☐	Communicate change to customers and/or have our team notify them when policies are transferred.	Sales rep

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