

Five Scheduling Tips for a Successful CAT Deployment



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MEDIA

Below are 5 tips on how to efficiently schedule your claims and stay deployed longer.

1 Chiiiiiiiii - Take a second to breathe

If this is your first deployment, it can seem overwhelming to get a lot of claims at once. Even if it's your 20th deployment, there is a certain amount of excitement when receiving a batch of claims. Take a moment to collect your thoughts and prioritize the tasks ahead. This will help keep you focused on one item at a time.

Once you have your bags packed and know where you'll be sleeping, it's time to review your claims.

2 Prioritize and Organize - Have a system

Acknowledge all of your assignments and read through any notes on the First Notice of Loss (FNOLS). This will give you a feel of the type of damages and severity of your claims. It is recommended to prioritize first contacts and inspections based on the severity of the damages. As you do this, have a system and workflow prepared to keep track of claims, notes, inspection dates, etc. Many people use Xactanalysis, FileTrac or other Claims Management Systems (CMS) to track this. Others keep a handwritten list on a notepad, a note on their phone, or a spreadsheet. Whatever method you prefer, make sure you're comfortable with the system. Have your system open and ready when you begin scheduling.

3 Segment or Group - Get your bearings

If your CMS programs will let you, map your claims. This will help you see where claims are clustered or scattered at a glance. Try to become familiar with surrounding areas such as toll bridges, gas stations, and food stops. Next, group your claims based on locations and establish certain days for certain areas. For example:

- Monday and Tuesday: Area 1
- Wednesday and Thursday: Area 2
- Friday and Saturday: Area 3

4 Reach Out and Schedule

Now that you have your claims sorted by severity, location, and days of the week, it is time to start contacting them. Have a calendar app open on a monthly or weekly view.

When contacting the insured, you can lead them to these predefined days using something like the following: "I will be in your area on Wednesday & Thursday, would either of these work for you?"

Try to reserve the first couple days of your inspections for the claims with the most detrimental damages. Before suggesting a date and time, ask the insured what type of damages have occurred to get an idea if they can wait a few days before you come out.

5 Update Notes

Once you have confirmed inspection dates and times for your claims, make sure to update your notes in the Claims Management System immediately and mark the contact box complete in XM8.

This will inform your claims manager and carrier on the status of your files and *hopefully* keep them from calling you.