by HUB

# Insurance Quoting How-to Guide

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# We are VIU by HUB

We're a trusted insurance brokerage that delivers over two decades of risk expertise to clients in the manner they choose – whether online through our digital insurance brokerage or via phone with our expert advisors. What that delivers for customers is choice, transparency, and the best selection of coverage for them and their families across their lifetimes.

## Powered by HUB International


**Number 1**

privately held personal insurance broker in the United States

**13,000 employees**

across North America

**Over 475 offices**

in the United States and Canada

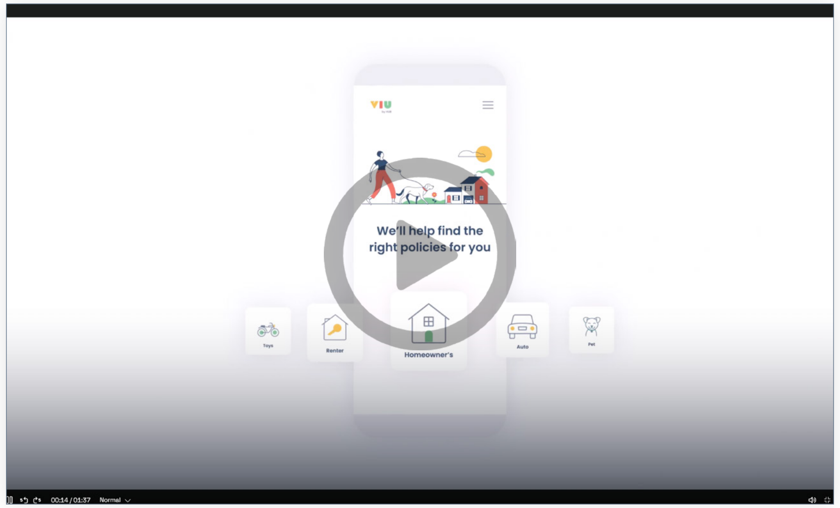
**25 years**

of serving our customers

VIU by HUB

## BENEFITS OF VIU BY HUB

# VIU by HUB makes the insurance process simpler for your customers.




Check out how VIU by HUB makes getting insurance effortless for your customer. [Watch the Video]

- Expansive brokerage expertise to secure the right coverage that protects what matters most
- Lightning-fast quotes from 50+ top, A-rated national carriers
- Expertise to move customers quickly through their closing process
- Ongoing insurance advice as your customers' lives change
- Tools like a digital wallet to easily manage all insurance policies
- Lifetime policy renewal service, so they only need to enter their information once

# Guiding their quote journey

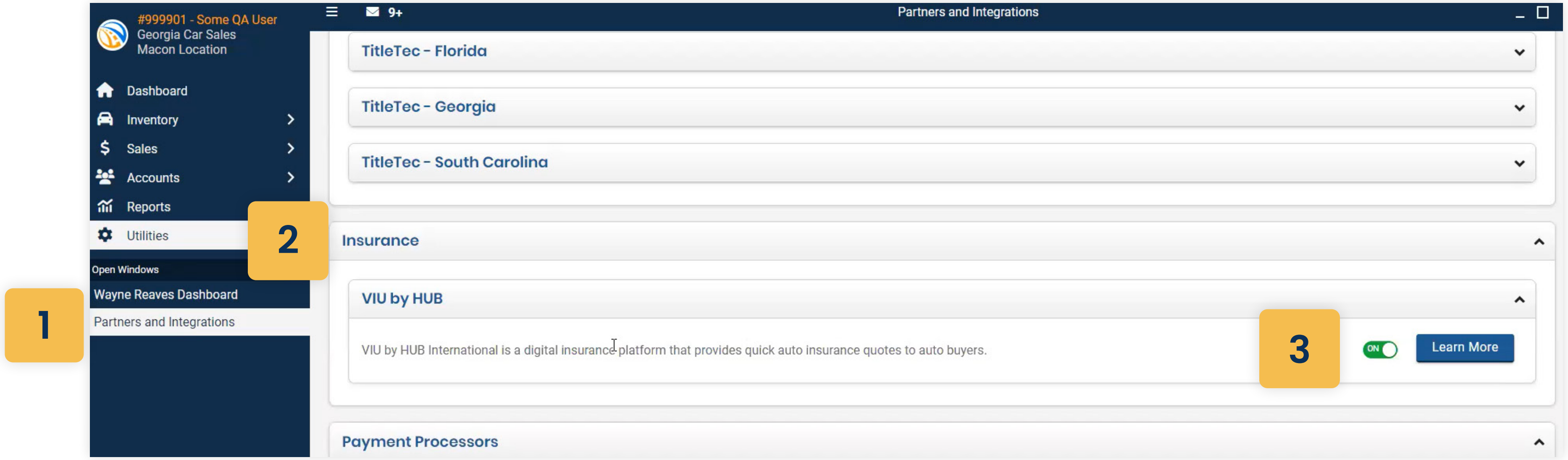
VIU by HUB provides each customer the guidance they need to find their customized quote.

> Activate quick quoting
> Referring your customer

ACTIVATE QUICK QUOTING

# Guiding their quote journey

Before referring your customers, visit the Partner and Integrations page to quickly activate and access the program resources. You'll only need to complete this step once.




1. Go to the "Partners and Integrations" page
2. Scroll down to Insurance > VIU by HUB
3. Click the toggle to "On" to activate the option to refer within the application.

***TIP:*** Click the "learn more" button to find resources that will guide you and your customers quickly through all you need to know! Come back and visit to stay a partnership expert.

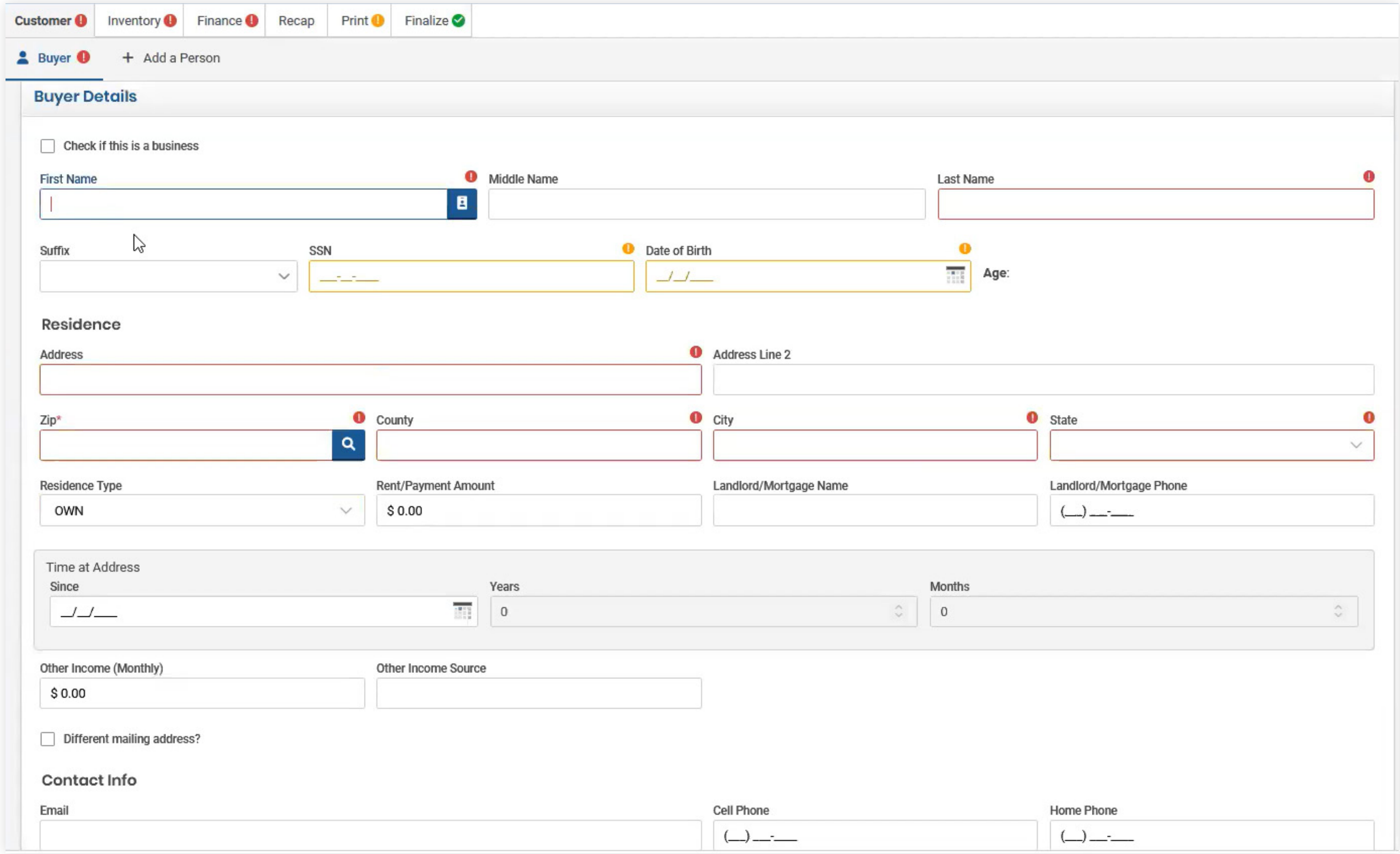
VIU by HUB



# Guiding their quote journey

It couldn't be easier to get your customer insured and driving home in their new auto. Follow these steps to make your referral.

**Step One:** Enter customer information within the application.



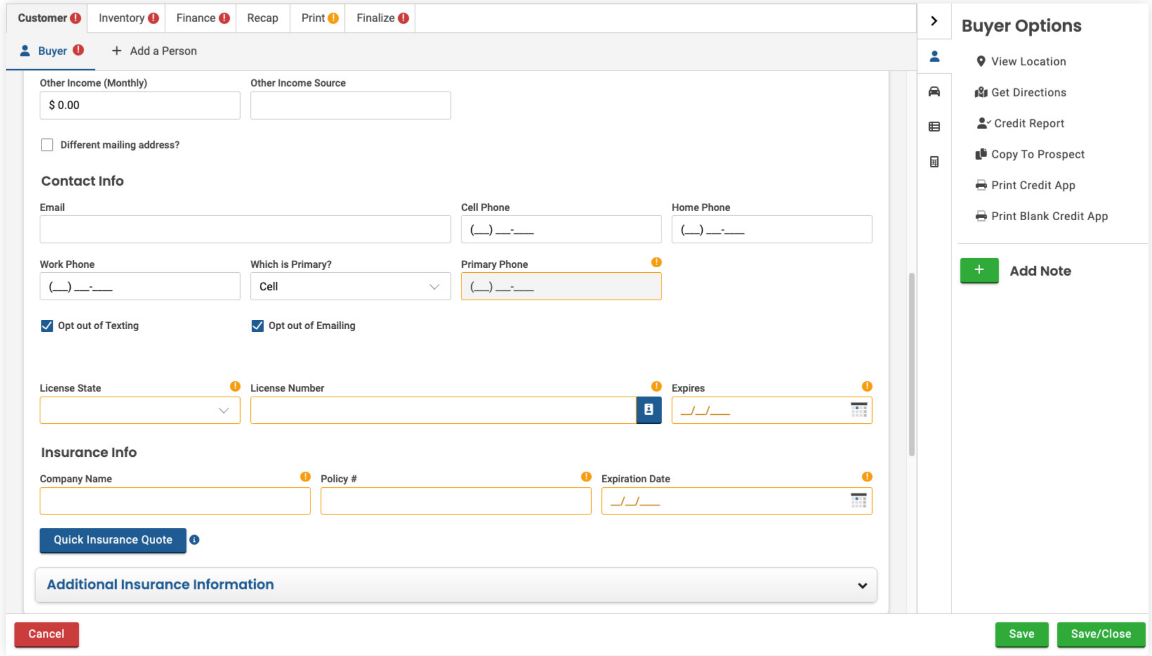

***Did you know?*** Your customer's information (name, address, email and phone) will prefill for them within their quote to save time and enhance their experience!

***TIP:*** Customer **email** OR **phone** is required to successfully submit the information to quote.

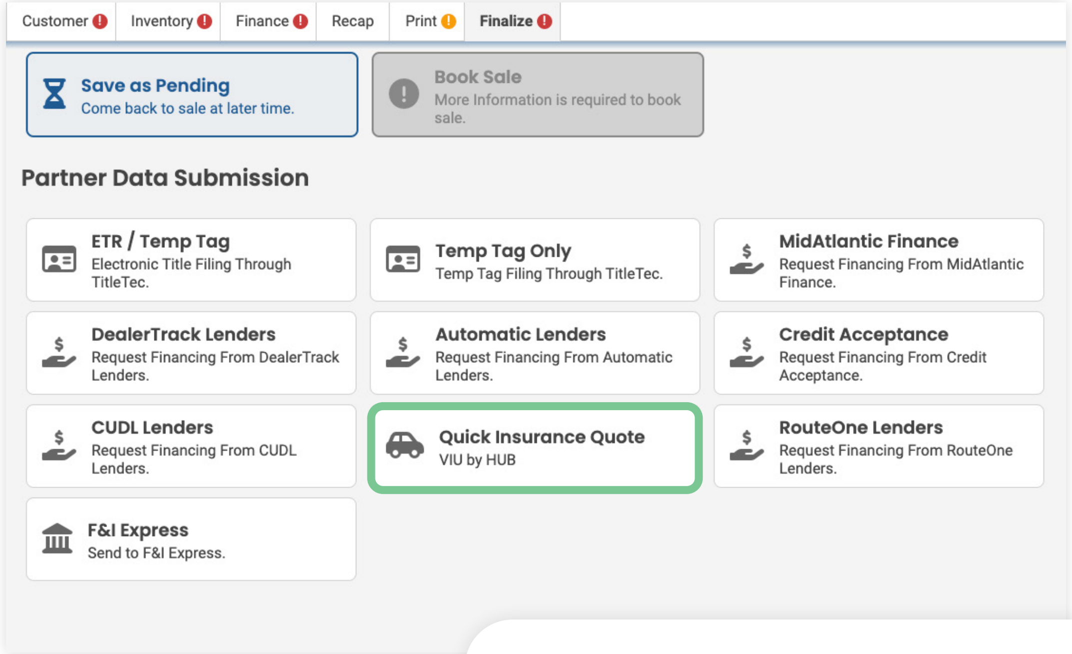
# Guiding their quote journey

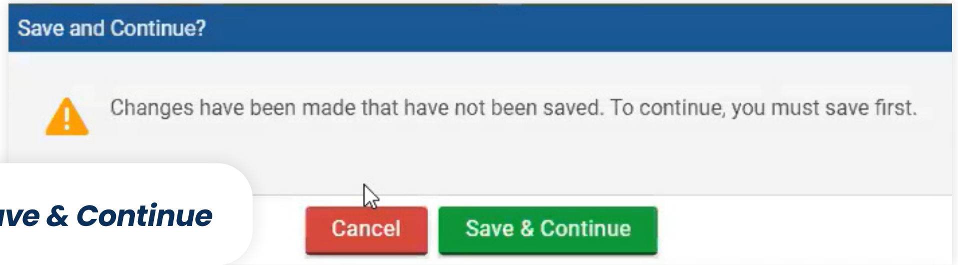
**Step Two**: Choose your preferred stage of the application to refer your customer and click “Quick Insurance Quote”

**Option 1:** Customer page within Insurance Info section




**Option 2:** Finalize page



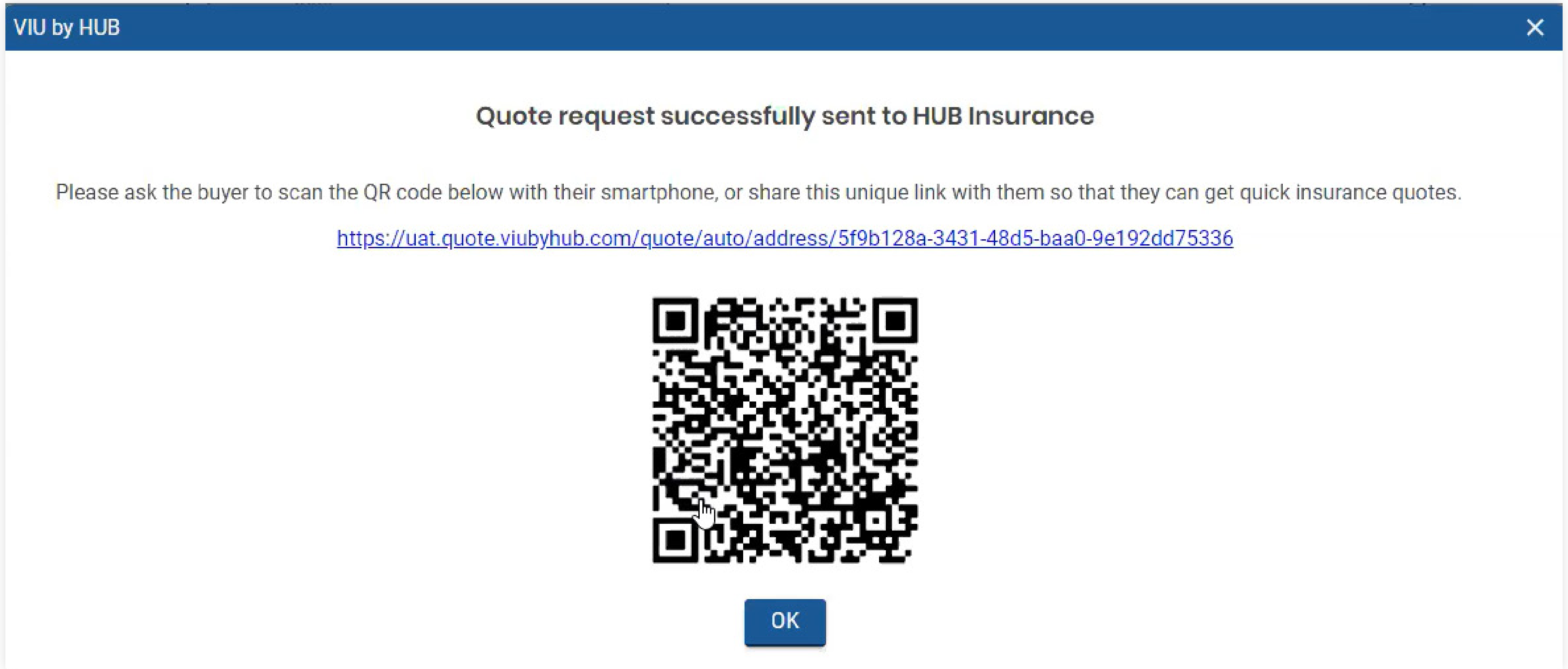




***Click Save & Continue***

***TIP:*** Sending the referral from the Finalize page saves the customer a step by prefilling the VIN on the quoting page!

# Guiding their quote journey

## Step Three: Share your screen with your customer so they can scan their unique QR code and quickly complete their quote




***Did you know?*** Each QR code is unique to the customer information entered. They will see their name, address and more prefilled within the VIU by HUB quote based upon the application information entered

***TIP:*** If your customer does not have a smartphone, the link can be copied to email to them or pasted into a browser.

***HOURS:*** The VIU by HUB advisory team is standing by at 1-833-991-4453 to help your customers get the insurance they need, Monday through Friday from 8 am - 9 pm and Saturday 11 am - 3 pm ET.

If outside normal business hours, an experienced VIU agent will call the customer the next business day to complete the policy purchase.

YOUR VIU BY HUB SUPPORT TEAM

# Who to contact

For any additional client requests, program questions or feedback contact our Strategic Partnerships team.
We will respond within 24 business hours.

**Email**
strategicpartnerships@hubinternational.com

For help, please contact Wayne Reaves support staff at 478-474-8779 or support@waynereaves.com.

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