

# Pending Business enhancements for upsell offers

354NB

**Date:** April 29, 2021**Effective:** April 29, 2021

North American is pleased to announce that the Paperless Pending report has been updated with enhanced search and viewing capabilities for cases where an upsell offer has been made. Through the Upsell Program, cases that meet certain criteria will be underwritten to determine the maximum face amount available. If your case qualifies for an upsell offer, you will be notified of the face amount being offered to your client with no additional underwriting requirements. The Upsell Program is a powerful sales tool that can increase your commission and allow you the opportunity to build a stronger relationship with your clients while providing the opportunity to increase their protection.

## **Search Functionality**

A new search option, labeled 'Upsell Offered', will locate any pending, approved, or issued cases with an upsell offer.

## **Upsell Identification**

Upsell offers will be highlighted with bold lettering in the notes section on the Paperless Pending Report.

**For additional questions, please contact your managing general agency (MGA). MGAs please contact your assigned New Business team**

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