

eDelivery Enhancements Cheat Sheet

NOVEMBER 2020

In order to support you in doing business from wherever you like, National Life launched eDelivery earlier this year — allowing you and your agency to seamlessly conduct business in this current, ever-changing environment.

We are thrilled to announce new features that make policy eDelivery even better. These enhancements were inspired directly by your feedback and aim to provide you more transparency and flexibility to support how you do business today. We've created this easy reference "cheat sheet" to provide you with all the information you need to know about the new tools, along with a few tips and tricks.

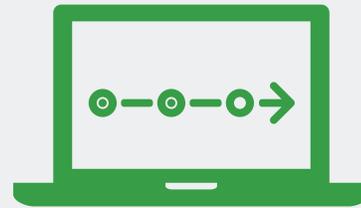
New features help you conduct eDelivery and engage your Client



Policy Promise

Exclusive to eDelivery, this document is a keepsake reference for your Client and available at multiple points in the process:

- Digital download from Agent Portal, Client Portal and Mobile Apps
- Order a high-quality printed copy



eDelivery Dashboard

- Visibility into the end-to-end eDelivery process, allowing you to see the status of your Client's policy

Products issued by

National Life Insurance Company® | Life Insurance Company of the Southwest®

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No bank or credit union guarantee | Not a deposit | Not FDIC/NCUA insured | May lose value | Not insured by any federal or state government agency

Guarantees are dependent upon the claims-paying ability of the issuing company.

Introducing the Policy Promise! A tangible touch point for your eDelivery Process

It's more than just a document – it's an opportunity to add something tangible to your process, giving you a reason to reach out to your Client and ask for referrals.

The Policy Promise is available for both Life and Annuity Policies

This document — exclusive to eDelivery — is designed to provide something tangible to your Client, whether you choose to deliver it electronically (via PDF) or by ordering a high-quality printed copy. It's also a quick and easy reference piece for your Client to keep on-hand. We made sure to include your contact information on it for the Clients' convenience.

This is intended to be a final touchpoint for you to leverage in your new business process.

Here are a few ideas:

- If you used to have a policy delivery ceremony, this can serve as that touchpoint with eDelivery.
- Consider having a virtual delivery ceremony over Zoom and virtually present this to your Client!
- Use this as an opportunity to ask your new Client for feedback... and, of course, referrals

Options for delivering the Policy Promise document:

- Download from Agent Portal (to electronically share with your Client)
- Order the print version, which can be mailed:
 - To you, for you to physically present to your Client
 - To your Client, for them to receive once eDelivery is complete. *Please note: The option to send to Client will only appear once eDelivery is complete; We only support mailing to addresses in the United States.*
- Guide your client to register online and access the Policy Promise directly in the Client Portal or Mobile App

The Policy Promise has been built into the eDelivery process to give you flexibility and control for when and how you use it. Find all the touchpoints in the "eDelivery Dashboard" section on the following pages.



Encourage your new Client to download the NLG mobile app, where they can easily access this on-the-go and even refer you from the app!

eDelivery Dashboard: Find it on the Agent Portal

Gives you visibility into where a policy is in the eDelivery, which can help you push policies through faster by understanding the outstanding tasks in the process.

You can find the eDelivery dashboard on the Agent Portal under [New Business > eDelivery Dashboard](#)

To help you prioritize, policies are sorted by issue date. A red dot next to "Issued Since" means the eDelivery is expiring soon.

Agent To-Do			Customer To-Do		
Issued Since	Policy Owner	Status	Issued Since	Policy Owner	Status
81 days	Jimmy Townsend	Opened	86 days	Jay Grant	Opened
78 days	Kevin Wood	Opened	84 days	Cora Watts	Opened
54 days	Louise Hart	Locked Out	56 days	Jerome Clark	Locked Out
54 days	Keith Harper	Opened	31 days	Andrew Payne	Opened
30 days	Ricky Carroll	Opened	28 days	Myrtle Neal	Opened
23 days	Howard Hunt	Bad Email Address	26 days	Mark Mills	Bad Email Address
10 days	Roy Herrera	Opened	24 days	Joe Chambers	Opened

Agent To-Do: See what policies are awaiting your signature.

Customer To-Do: You can easily view underlying status of policies waiting on Client action – We recommend reaching out to the Client to help them through experience.

From the dashboard, click on the Client's name to access detailed eDelivery information and status, including:

- **Client Contact Information** for easily getting in touch with your Client
- **DocuSign Workflow Progress**, which gives you a deeper look at where your Client is in the process and the date each milestone was completed
- **Access to the Policy Package** to easily reference all coverage details
- **Access to the Policy Promise** by clicking “Policy Promise” (for PDF version) or “Request Printed Policy Promise” (for full print experience)

Client Name Rena Harper	Insured Name Ophelia Stone	
Email ClientName@email.com	Mobile (555) 555-5555	Home Phone (555) 555-5555
Issue Date 05/23/2020	Sent Date 04/23/2020	eDelivery Expiration Date 05/23/2020
Policy Package	Policy Promise	Request Printed Policy Promise

04/23 04/28

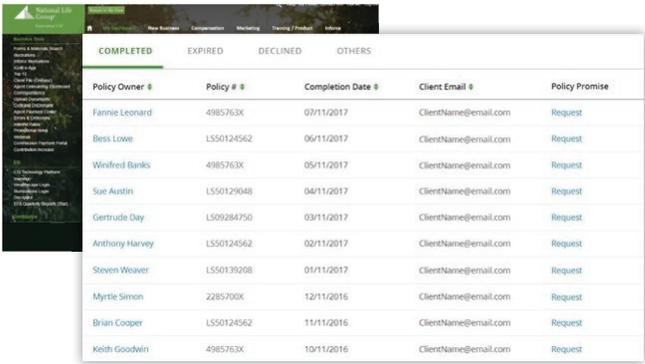
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Sent Opened by Agent Signed by Agent Opened by Client Signed by Client Completed

Ordering the Policy Promise:

There are several different places on the eDelivery Dashboard where you can choose to download or request a mailed Policy Promise.

- From the completed section at the bottom of the eDelivery Dashboard
- You can view, download or order the Policy Promise from the eDelivery details view accessible by clicking on the Client name from any view in the dashboard.



Policy Owner #	Policy #	Completion Date	Client Email	Policy Promise
Fannie Leonard	4985763X	07/11/2017	ClientName@email.com	Request
Bess Lowe	L550124562	06/11/2017	ClientName@email.com	Request
Winifred Banks	4985763X	05/11/2017	ClientName@email.com	Request
Sue Austin	L550129048	04/11/2017	ClientName@email.com	Request
Gertrude Day	L509284750	03/11/2017	ClientName@email.com	Request
Anthony Harvey	L550124562	02/11/2017	ClientName@email.com	Request
Steven Weaver	L550139208	01/11/2017	ClientName@email.com	Request
Myrtle Simon	2285700X	12/11/2016	ClientName@email.com	Request
Brian Cooper	L550124562	11/11/2016	ClientName@email.com	Request
Keith Goodwin	4985763X	10/11/2016	ClientName@email.com	Request

eDelivery Status: Policy LS720720720

Client Name: Joe Policyholder
Email: Joe.Policyholder@email.com
Issue Date: 08/24/2020
[View Policy Package](#)

Insured Name: Joe Policyholder
Mobile: 555-555-5555
Sent Date: 08/18/2020
[View Policy Promise](#)

Home Phone: 555-555-5555
eDelivery Expiration Date: 11/16/2020
[Order Policy Promise](#)



Policy Promise Requested.
Requested Date: 10/29/2020
 Please allow 7-10 business days for delivery.

A printed copy will be sent to
 Joe Policyholder
 1 National Life Dr.
 Montpelier, VT
 05604

Printed Policy Promise Status

If ordering a printed version, the Policy Promise status is reflected on the client tracking view of the Dashboard:

- Fulfillment status
- Date requested
- Delivery Recipient (i.e., is it being sent to you or the Client)