

# LevelX Leader Guide

## What Was Your Intent?



Nationwide®

### Purpose

This guide is designed to help you, as a leader, actively engage in the learning and development of your associate(s). By assigning on-demand learning courses and facilitating meaningful follow-up discussions, you can support your associate(s) in applying new knowledge and skills directly to their roles, fostering a culture of continuous improvement and professional growth.

### Leader's Role

- Review this guide, view the course, and prepare for the discussion with your associate.
- Assign your associate to complete the course, while also communicating purpose and expectations:
  - Provide the link to the course and encourage notetaking.
  - Provide a deadline for course completion.
  - Request the associate to bring a current or upcoming account/policy to the follow-up meeting.
- Schedule a 15-20 minute follow-up meeting to discuss the course.
- Utilize the information on this page to guide your conversation; adjust as needed.

### Course: What Was Your Intent? *Is that Claim Covered?*



#### Link

<https://app.fugent.com/t/key/ZoQlWmV6lMxV8Q2OZggR8dth>

**LevelX**  
A virtual development experience



#### Description

Claims can happen at any time, making it crucial to consider underwriting intent when quoting, binding, and issuing policies. This course will teach you how to address exposures, ensure proper coverage forms, and accurately reflect coverage intent, so you're prepared in the event of a claim.



#### Discussion Questions

- What is your understanding of your backdate authority on any policy written with Nationwide ESS?
- What issues have you found in your most recent quote/binder/policy that needed to be addressed? (e.g., conflicting/incorrect forms, incorrect addresses, misaligned information, etc.)
- What are some actions you have already taken to determine your underwriting intent? What did that step reveal or what else did you need to do to clarify the intent of coverages?
- What additional actions can you take to ensure your quote/binder/policy clearly reflects your underwriting intent of coverages?
- Do you double check to make sure all completed Acord and required supplemental applications, and any additional information are in file so anyone from our agency or Nationwide could easily determine our intent?
- What are some action items/tips from this course that you might not have considered before and will do moving forward during the underwriting process?

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Capture key takeaways from the course in the space below and note any topics you'd like to explore further in your discussion.



Jot down insights from your conversation below and outline any next steps or follow-up actions.