



Shepherd
INSURANCE

Consulting Phone Number
(888) 683-9467



Shepherd Insurance

BUSINESS CONCIERGE CLIENT GUIDE

Business Concierge

Client Support



To ensure the best service, and quickest response, please use one of the three options below.

Phone Number

888-683-9467

M-F 9am - 7pm EST

Any message during off hours will be returned the next business day. You can call and/or text this number directly to reach our client support team.

Email Address

concierge@shepherdins.com

Any email sent to this address goes directly into our help desk followed by an immediate response. This email will be used in all correspondence.

Client Portal

shepherdins.com

Online portal where you can request and manage consults, buy and access all products and services.

How to book an onboarding

Please use this link to book an onboarding at the most convenient time for you and other staff.

Please call 888-683-9467 to schedule

Company Onboarding

We encourage you to go through a quick onboarding by our client support specialist:

Here is the flow of a typical onboarding session.

1 Review client portal and overview of services:

- Where and how to sign into the client portal
- Walk through how consult process works
- How to request all other products and services
- Review if there is immediate need for any services
- Ask if other employees should be added as users

2 Walkthrough of consult process

Discuss types of questions, typical consult timeframes, and expectations for consults and address any questions.

3 Detailed review products and services

Our client support team will ask if there are any immediate needs and help get you any further details regarding any product or service.

Consulting Definition and Process



A consult is considered a specific question regarding a specific topic. Consults for multiple states, should be submitted separately due to laws in each state being different.

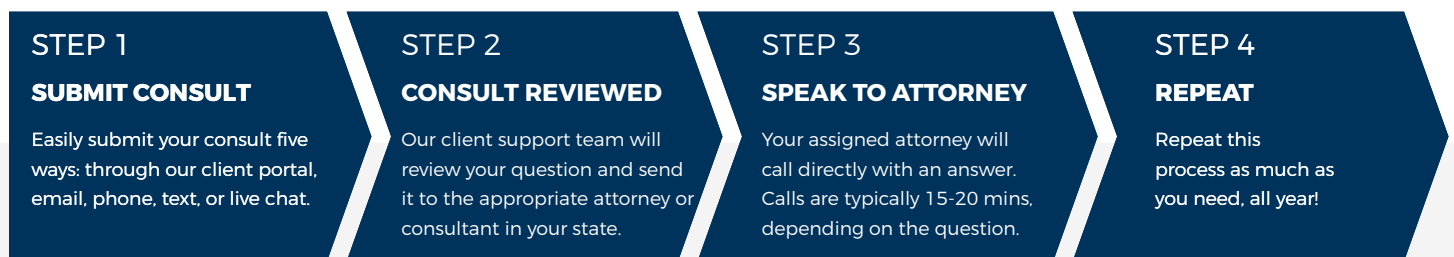
A consult is considered free if the question can be answered by the attorney during the initial call.

- EXAMPLES**
- “ We need to terminate an employee for stealing, but only have hearsay from employees. Do we need evidence?
 - “ We hire subcontractors for labor as needed. How do we handle their worker's comp?
 - “ How do FMLA laws apply to an employee who is caring for a sick child/partner?

All initial consults are free; however, some consults may entail more work such as a detailed contract review.

- EXAMPLES**
- “ We need to review our subcontract and make any necessary changes per the findings of the review.

This would not be considered free, as the attorney will require more time than the initial call to complete the work for the client. This would apply to any questions that will require additional work from the attorney extending beyond the initial free phone consultation.



1. Client Portal

This is the most convenient way to submit a consult. Simply login to your account, fill out the consult form and submit.

2. Phone Call

You can submit your consult by calling
888-683-9467
M-F 9am - 7pm EST



Business Concierge Services Plans

Standard Plan

Included

for Shepherd Clients

3 Consults

Live HR Hotline

Standard Pricing

Premium Plan

\$300
per year

Unlimited Consults

Live HR Hotline

10% off Products and Services

ASK AGENT FOR DETAILS