

Sales and Retention Report: **Practical Application** **“Don’t Miss an Opportunity”**

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Sales & Retention Report: Don't Miss an Opportunity

Objectives:

- Status and Sub-statuses use and importance
- Techniques to drive suspects from leads to prospects to clients
- Techniques to market to prospects who didn't buy
- Techniques to analyze refusals and reasons
- Techniques to project monthly forecasted sales and revenue
- Retention tactics from renewal reports
- How to go back to your agency and put this report to use

What grows an insurance
agency....?

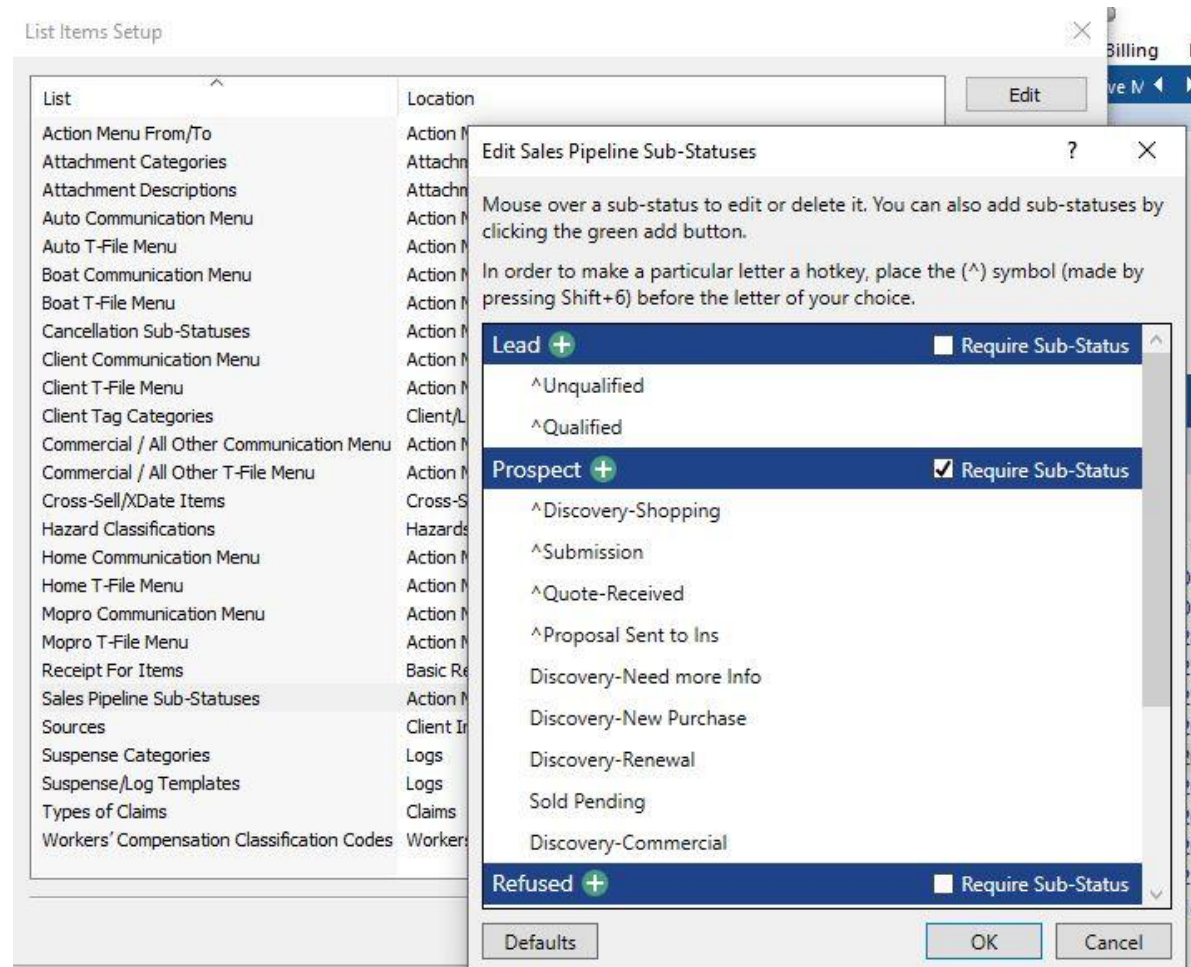
Sales & Retention Report:

STATUS & SUB-STATUS

- Status / Sub-status Management in CMS
 - Status: Every agency is different. YOU have to define every status in your agency and manage them accordingly. You can't change these so define them correctly and promulgate it!
 - LEAD
 - PROSPECT
 - REFUSED
 - REJECTED
 - Sub-status: YOU have the ability to add or delete what doesn't work for you. Under constant refinement; be adaptive to change.

How to Modify / Add Sub-Statuses

- Under Gear
 - Customize List
 - Sales Pipeline Sub-Statuses





Don't Miss an Opportunity: **Define Your Policy Statuses**



- **Leads** (qualified and unqualified)

- **Prospects** (ex-date, decision maker, LOB)
- **Refusals** (customer said NO)

- **Rejections** (agency or carrier said NO)
 - What do we do for sub-statuses?

Beacon Insurance Prospective Policy Sub-Statuses



- **Personal Lines specific:**
 - Discovery - Purchase
 - Discovery - Renewal
 - Discovery - Shopping
- **Commercial Lines specific:**
 - Discover - Commercial Only
- **Other categories:**
 - Discovery - More Info Needed
 - Discovery - Future
 - Realtor / Lender
- **Universal:**
 - Submission
 - Quote
 - Proposal
 - Sold Pending

Sales Pipeline	
▼ Lead	6
Unqualified	3
Qualified	3
▼ Prospect	295
Discovery - Purchase	3
Discovery - Renewal	6
Discovery - Shopping	7
Discovery - Commercial Only	15
Discovery - More Info Needed	20
Discovery - Future	59
Submission	25
Quote	9
Proposal	106
Sold Pending	29
Realtor / Lender	13
(All Others)	3
▼ Refused	7,304
Price	542
Didn't Buy Risk	325
No Contact	708
Add Info Not Provided	76
(All Others)	5,653
▼ Rejected	75
U/W Rejected	52
Agency Disqualified	6
Could Not Compete	10
(All Others)	7

Create & Define Your Sub-Statuses: Leads



Agency Intelligence | Sales & Retention | Advanced | Open | Save | Print | Refresh | Tutorial

Sales & Retention x

Sales Pipeline

▼ Lead	7
Unqualified	2
Qualified	5
▼ Prospect	360
Discovery - Purchase	2
Discovery - Renewal	1
Discovery - Shopping	8
Discovery - Commercial Only	54
Discovery - More Info Needed	14
Discovery - Future	36
Submission	17
Quote	4
Proposal	190
Sold Pending	29
Realtor / Lender	4

Policies with Status 'Lead'

Group By Application Type Search By Status Date Date Range All Dates by None Compare Clients

Application Type	Lead
Commercial	7

Lead: a qualified or unqualified policy where no real insurance conversation has ever been made with any decision maker in the organization.

- Qualified**: We know we have the market for the risk in order to write the line of business.
- Unqualified**: We don't understand the risks they have, hence we don't know if the policy is qualified to be pursued.

- Beacon's Use**: Commercial Policies only!!

Create & Define Your Sub-Statuses: Leads

Agency IntelligenceSales & RetentionAdvancedOpenSavePrintRefreshTutorial

Sales & Retention

Sales Pipeline

Lead20

Unqualified19

Qualified1

(No Sub-Status)0

Prospect464

Discovery-Shopping42

Submission2

Quote-Received0

Proposal Sent to Ins27

Discovery-Need more Info10

Discovery-New Purchase1

Discovery-Renewal1

Sold Pending3

Discovery-Commercial0

(All Others)378

Refused58

Rejected6

Policies with Status 'Lead: Qualified'

What's this?

Group By ProducerSearch By Status DateDate Range All Dates

by NoneCompare Clients

Table Filters

Producer	Qualified
Dirk M Zeigler (DMZ)	1

Lead: a qualified or unqualified suspect where no real insurance conversation has ever been made with any decision maker in the organization.

- Qualified**: We know we have the market for the risks they need coverage for.
- Non-qualified**: We don't understand the risks they have, hence we don't know if they are qualified to pursue.
- Primary source**: REFERRALS or Employee Relationship

What's the goal from any Lead:



TO TURN THE POLICY INTO A

PROSPECT

Quote Sheets / Building a Prospect



HOMEOWNER / DWELLING QUOTE SHEET

LAST NAME: _____	
Rcvd Date: _____	SOURCE: _____ Date Promised / Due: _____
PERSONAL INFORMATION	
Name: _____ Spouse: _____	
DOB: _____ SSN: _____	DOB: _____ SSN: _____
Address: _____	
Cell Number: _____	Other: _____
Email: _____ .com/net/org/	
WHAT IS YOUR FAVORITE WAY TO COMMUNICATE WITH YOUR INSURANCE AGENT? CALL: Cell / Other TEXT EMAIL	
NEW PURCHASE	CURRENTLY INSURED
Closing Date: _____	Renewal Date: _____
Approved for Financing: Y / N	Current Carrier: _____
Best Quote Received: \$ _____	Annual Premium: \$ _____
FINANCIALS	
FICO Score: _____ Foreclosure / Bankruptcy Year: _____ Escrowed: Y/N (Mortgage CO: _____)	
Insurance Claims: _____ number of times in past 5 years Amount: _____ Same Property: Y / N	
UNDERWRITING INFORMATION	COVERAGES
Year Built: _____ SQ FT: _____ Stories: _____	Dwelling: _____
Construction Type: _____ Roof: _____	Other Structures: _____
Foundation: _____ Distance from Coast: _____	Personal Property: _____
Heat source: Gas / Electric / Other Wind Mitigation: _____	Loss of Use: _____
Detached Structure Type: _____ SQ FT: _____	Fair Rental Value: _____
Pool: _____ Fence: _____ Trampoline: _____	Premise Liability: _____
Dogs: _____ Bite History: _____	Medical Payment: _____
Burglar Alarm System: Y / N Monitored: Y / N	Wind / Hail: _____
Smoke Alarm System: Y / N Monitored: Y / N	AOP Deductible: _____
UPGRADES (YEAR & Annotate F - Full or P - Partial)	Flood: _____
Electrical: _____ Plumbing: _____ HVAC: _____ Roof: _____	DWELLING USAGE (circle all that apply)
Fire Department: _____	Primary Residence
Distance to Hydrant: _____ ft / yds	Rental Property
PROTECTION CLASS: _____ Flood Zone: _____	Vacant / Occupied

We have a **Profile Sheet** for every line of business we write

Biggest takeaway from us is the “Why are you contacting us?” - this correlates to the PL sub-statutes

AUTOMOTIVE QUOTE SHEET

LAST NAME: _____	
Rcvd Date: _____	SOURCE: _____ Date Promised / Due: _____
PERSONAL INFORMATION	
Name: _____ Spouse: _____	
Address: _____	
Cell Number: _____	Other: _____
Email: _____ .com/net/org/	
WHAT IS YOUR FAVORITE WAY TO COMMUNICATE WITH YOUR INSURANCE AGENT? CALL: Cell / Other TEXT EMAIL	
NEW PURCHASE	CURRENTLY INSURED
Best Quote Received: \$ _____	Renewal Date: _____
Lienholder: _____	Current Carrier: _____
Loan #: _____	Premium: \$ _____ / 6 mon or year
DRIVER INFORMATION	
Driver 1: _____ DL#: _____ ST: _____ DOB: _____	
SSN: _____ Occupation: _____ Education Level: HS / Some Coll / Bach / Master	
Accidents/Violations: _____	
Driver 2: _____ DL#: _____ ST: _____ DOB: _____	
SSN: _____ Occupation: _____ Education Level: HS / Some Coll / Bach / Master	
Accidents/Violations: _____	
Driver 3: _____ DL#: _____ ST: _____ DOB: _____	
SSN: _____ Occupation: _____ Education Level: HS / Some Coll / Bach / Master	
Accidents/Violations: _____	
VEHICLE INFORMATION	
Year: _____ Make: _____ Model: _____ VIN: _____	
Primary Driver: _____ Annual Mileage: _____ # Years Owned: _____	
Year: _____ Make: _____ Model: _____ VIN: _____	
Primary Driver: _____ Annual Mileage: _____ # Years Owned: _____	
Year: _____ Make: _____ Model: _____ VIN: _____	
Primary Driver: _____ Annual Mileage: _____ # Years Owned: _____	
COVERAGES	
FULL / LIABILITY ONLY / LIABILITY & UNINSURED MOTORIST / NON-NAME OWNER	
LIMITS: 25/50/25 50/100/50 100/300/100 250/500/250 300 OR 500 CSL	
COMPREHENSIVE DEDUCTIBLE: 250 500 1000 2500	
COLLISION DEDUCTIBLE: 250 500 1000 2500	
MEDICAL PAYMENTS: 1000 2000 3000 4000 5000 10000	
RENTAL: YES / NO ANY AUTO INSURANCE CLAIMS IN PAST 5 YEARS? YES / NO Amount: \$ _____	

Home Intake questions



Property Information						
Full Name						
Email						
Address					Year Built	
Previous address					Central Fire	
Current Insurance Provider					Central Burglar	
Claims in last 3 years explain					Square Footage	
Garage	Bedroom	Foundation	Bathrooms	Security	Patio/Deck	Plumbing
<input type="checkbox"/> Attached	<input type="checkbox"/> 1	<input type="checkbox"/> Slab	<input type="checkbox"/> 1	<input type="checkbox"/> Dead Bolt	<input type="checkbox"/> Patio	<input type="checkbox"/> Copper
<input type="checkbox"/> Detached	<input type="checkbox"/> 2	<input type="checkbox"/> Crawl	<input type="checkbox"/> 1 1/2	<input type="checkbox"/> Fire Extgshr	<input type="checkbox"/> Deck	<input type="checkbox"/> PVC
<input type="checkbox"/> Carport	<input type="checkbox"/> 3	<input type="checkbox"/> Finished Bsmt	<input type="checkbox"/> 2	<input type="checkbox"/> Smoke Detr	<input type="checkbox"/> Porch	Last Update
	<input type="checkbox"/> 4	<input type="checkbox"/> Unfinish Bsmt	<input type="checkbox"/> 2 1/2	<input type="checkbox"/> Burglar Alarm	<input type="checkbox"/> Balcony	
	<input type="checkbox"/> 5+		<input type="checkbox"/> 3	<input type="checkbox"/> Fire Alarm	<input type="checkbox"/> Other	
				<input type="checkbox"/> Sprinklers		
Flooring	Electrical Sys	Use	Roof	Type Of Exterior	Design	Type of Property
<input type="checkbox"/> Carpet	<input type="checkbox"/> Breaker	<input type="checkbox"/> Primary	<input type="checkbox"/> Composition	<input type="checkbox"/> Mostly Brick	<input type="checkbox"/> One Story	<input type="checkbox"/> Single Family
<input type="checkbox"/> Tile	<input type="checkbox"/> Fuse	<input type="checkbox"/> Secondary	<input type="checkbox"/> Wood	<input type="checkbox"/> Mostly Stone	<input type="checkbox"/> Bi-level	<input type="checkbox"/> Multi Family
<input type="checkbox"/> Hardwood	<input type="checkbox"/> Unsure	<input type="checkbox"/> Vacation	<input type="checkbox"/> Tile	<input type="checkbox"/> Mostly Wood	<input type="checkbox"/> Two Story	<input type="checkbox"/> Condominium
<input type="checkbox"/> Lenolium	<input type="checkbox"/> Copper	<input type="checkbox"/> Investment	<input type="checkbox"/> Metal	<input type="checkbox"/> Stucco	<input type="checkbox"/> Tri-level	<input type="checkbox"/> Apartment
<input type="checkbox"/> Other	<input type="checkbox"/> Aluminum	<input type="checkbox"/> Other	<input type="checkbox"/> Other	<input type="checkbox"/> Veneer	<input type="checkbox"/> Basement	<input type="checkbox"/> Townhome
<input type="checkbox"/>	Last Update		Last Update	<input type="checkbox"/> Siding		<input type="checkbox"/> Duplex
				<input type="checkbox"/> Other		<input type="checkbox"/> Mobile Home
Pool	Inground Y/ N	Fenced Y/N	Diving Board Y /N			
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have a fireplace? If yes, how many?					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you live on acreage? If yes, how many acres					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have central A/C? If yes, when was it last updated?					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Does anyone in your household smoke?					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you within the city limits?					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you within 1000 feet of a fire hydrant?					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Is the property within 5 miles of a full-time fire department?					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have any detached structure such as a garage, carport, cabana, guest house, etc.?					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Is the detached Structure being rented to another party					
<input type="checkbox"/> Yes <input type="checkbox"/> No	Any dogs in the home? What breed? Have they ever bit anyone Y / N					

Define Your Sub-Statuses:

Discovery.....



Agency Intelligence

Sales & Retention

Advanced

Open

Save

Print

Refresh

Tutorial

Sales & Retention X

Sales Pipeline

▼ Lead	7
Unqualified	2
Qualified	5
▼ Prospect	360
Discovery - Purchase	2
Discovery - Renewal	1
Discovery - Shopping	8
Discovery - Commercial Only	54
Discovery - More Info Needed	14
Discovery - Future	36
Submission	17
Quote	4
Proposal	190
Sold Pending	29
Realtor / Lender	4

Policies with Status 'Prospect: Discovery - Commercial Only'

[What's this?](#)
Group By Search By Date Range by

Define Your Sub-Statuses: Discovery



File Edit View

Agency Intelligence Sales & Retention Advanced Open Save Print Refresh Tutorial

Agency Intelligence XDate Report (26 records) Production Report (61 records) Sales & Retention x

Sales Pipeline

▼ Lead	21
Unqualified	19
Qualified	2
(No Sub-Status)	0
▼ Prospect	455
Discovery-Shopping	36
Discovery-Need more Info	8
Discovery-New Purchase	1
Discovery-Renewal	2
Discovery-Commercial	0
Submission	4
Quote-Received	0
Proposal Sent to Ins	27
Sold Pending	1
(All Others)	376
► Refused	56
► Rejected	9

Policies with Status 'Prospect: Discovery-Need more Info' [What's this?](#)

Group By: Producer Search By: Effective Date Date Range: Next 120 Days by Month Compare Clients

Producer	March 2019	April 2019	May 2019	June 2019	July 2019
Dirk M Zeigler (DMZ)	0	6	1	1	0

Prospect: Discovery –

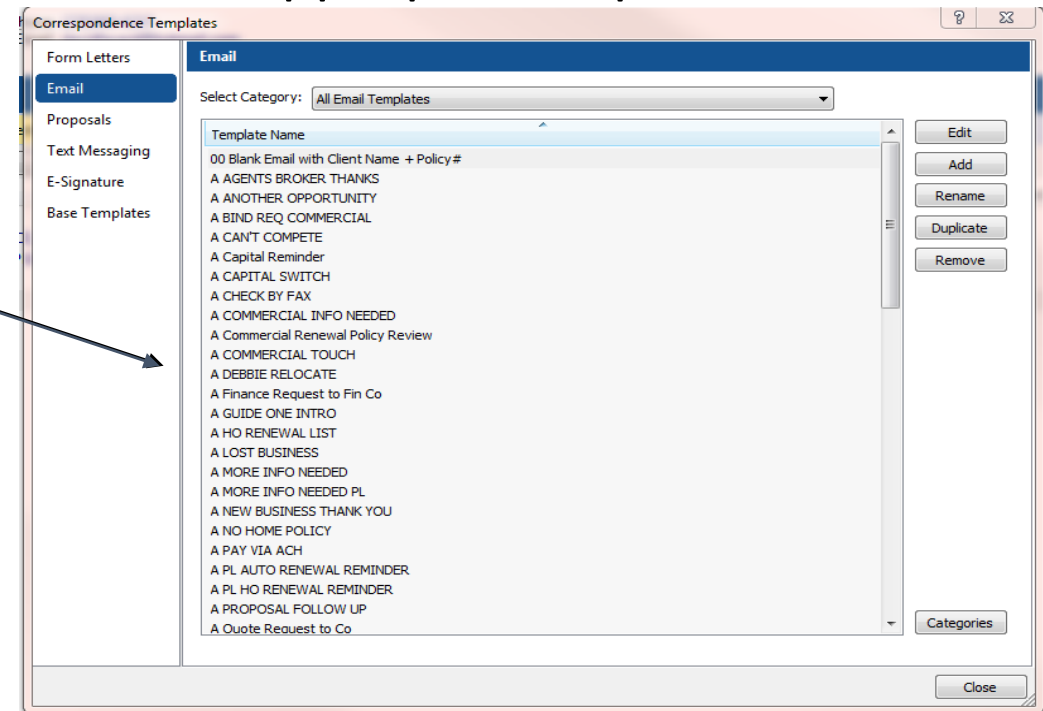
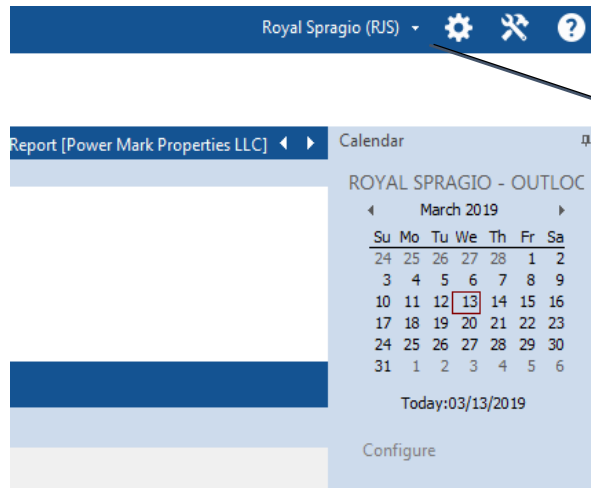
- Producer manages priority BASED ON THE PROPOSED EFFECTIVE DATE (EX DATE)
- Producer/ CSR contacts directly to complete underwriting information if necessary
- Producer/CSR takes through submission and quoting

Correspondence Templates

- Get the most out of Hawksoft by developing email and letter templates that can aid in the sales process.
- Customized sub-statuses should have its own piece of correspondence that can make your jobs easier regarding communication.

How to Build Correspondence Templates

- Again, under the gear, select “Correspondence Templates”
- Then “add”
- Create a title and build your own
- Use the custom field “inserts” to make it more appropriate / personal



Work your Sub-Statuses: Discovery - More Info Needed



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Sales & Retention x

Sales Pipeline

▼ Lead	7
Unqualified	2
Qualified	5
▼ Prospect	360
Discovery - Purchase	2
Discovery - Renewal	1
Discovery - Shopping	8
Discovery - Commercial Only	54
Discovery - More Info Needed	14
Discovery - Future	36
Submission	17
Quote	4
Proposal	190
Sold Pending	29
Realtor / Lender	4

Policies with Status 'Prospect: Discovery - More Info Needed'

[What's this?](#)

Group By Application Type Search By Effective Date Date Range Next 120 Days by Month

Application Type	November 2018	December 2018	January 2019	February 2019	March 2019
Personal	4	1	0	0	0

Email Template Editor - A MORE INFO NEEDED.html

File Edit Format Insert Tools View Help

Save Print Cut Copy Paste Aa HTML Plain Text Insert Attach Spelling Open in New Window

Subject BEACON INSURANCE SERVICES: IMPORTANT INFO NEEDED ☐ Request Read Receipt

Arial 2 **A** *A* **T** **B** *I* U

Dear <<Cli_FirstNames:PC>>,

Our office recently spoke with you about a quote on your commercial insurance. I tried to contact you again to gather more information but I was not successful.

Please contact me at your earliest convenience to answer the remaining necessary underwriting questions so we can offer you a proposal in a timely manner.

Thank you for the opportunity to earn your business!

Sincerely,

Sales Pipeline

▼ Lead	21
Unqualified	19
Qualified	2
(No Sub-Status)	0
▼ Prospect	457
Discovery-Shopping	37
Discovery-Need more Info	8
Discovery-New Purchase	1
Discovery-Renewal	2
Discovery-Commercial	0
Submission	4
Quote-Received	0
Proposal Sent to Ins	27
Sold Pending	2
(All Others)	376
▶ Refused	56
▶ Rejected	9

Policies with Status 'Prospect: Discovery-Need more Info'

[What's this?](#)

Group By: Producer
 Search By: Effective Date
 Date Range: Next 120 Days
 by: Month
 Compare: Clients

Table Filters

Producer	March 2019	April 2019	May 2019	June 2019	July 2019
Dirk M Zeigler (DMZ)	0	3	0	1	0

File Edit Format Insert Tools View Help



Save



Print



Cut



Copy



Paste



HTML



Plain Text



Insert



Attach



Spelling



Open in New Window

Subject: Additional Information Needed

☐ Request Read Receipt

Arial

2



Dear <<Cli_FirstNames:PC>>,

We recently spoke to you about a quote on your personal Insurance. We tried contacting you again to gain the required additional information but we were not successful.

Please contact us at your earliest convenience to provide the remaining necessary underwriting questions so we can provide you with a proposal in a timely manner.

Thank you again for the opportunity to earn your business.

Sincerely,

Work the Work You've Already Completed: Proposal Follow-ups



Agency Intelligence



Sales & Retention



Advanced



Open



Save



Print



Refresh



Tutorial

Sales & Retention X

Sales Pipeline

▼ Lead	7
Unqualified	2
Qualified	5
▼ Prospect	360
Discovery - Purchase	2
Discovery - Renewal	1
Discovery - Shopping	8
Discovery - Commercial Only	54
Discovery - More Info Needed	14
Discovery - Future	36
Submission	17
Quote	4
Proposal	190
Sold Pending	29
Realtor / Lender	4

Policies with Status 'Prospect: Proposal'

[What's this?](#)

Group By Application Type Search By Effective Date Date Range Next 120 Days

Application Type	November 2018	December 2018	January 2019	February 2019	March 2019	
Personal	25	6	2	1	0	
Commercial	7	9	0	0	0	

File
Edit
Format
Insert
Tools
View
Help

Save
 Print
 Cut
 Copy
 Paste
Aa HTML
Aa Plain Text
<-> Insert
 Attach
ABC Spelling
 Open in New Window

Subject FOLLOW UP FROM BEACON INSURANCE: PLEASE RESPOND
☐ Request Read Receipt

Tahoma
2
A A T B I U

Dear <<Cli_FirstNames:PC>> ,

Our agency sent you a <<Po_LOBDescriptions>> proposal recently. Please reply and let us know if you're still interested in purchasing the policy and the date in which you desire it to go into effect.

If you do not wish to purchase the proposed policy, please let us know why so we can update our records. Was it the price or was it a bad experience? Also, if you have already communicated your intentions with my agents please let me know that as well. Your feedback is extremely important to me.

Thank you for allowing us the opportunity to earn your business!!

For your information, open the attached document to see all of the other things Beacon Insurance Services has to offer.

Sincerely,



Sales Pipeline

▼ Lead	21
Unqualified	19
Qualified	2
(No Sub-Status)	0
▼ Prospect	458
Discovery-Shopping	36
Discovery-Need more Info	8
Discovery-New Purchase	1
Discovery-Renewal	2
Discovery-Commercial	0
Submission	4
Quote-Received	0
Proposal Sent to Ins	31
Sold Pending	1
(All Others)	375
▶ Refused	56
▶ Rejected	9

Policies with Status 'Prospect: Proposal Sent to Ins'

[What's this?](#)
Group By Producer Search By Effective Date Date Range Next 120 Days by Month Compare Clients

Producer	March 2019	April 2019	May 2019	June 2019	July 2019
Dirk M Zeigler (DMZ)	3	4	4	1	0

File Edit Format Insert Tools View Help



Save



Print



Cut



Copy



Paste

Aa

HTML

Aa

Plain Text



Insert



Attach



Spelling



Open in New Window

Subject Proposal Follow up

☐ Request Read Receipt

Arial

2



Dear <<Cli_FirstNames:PC>>,

We recently sent you a <<Pol_LOBDescriptions>> proposal. Please reply and let us know if you would like to move forward with purchasing the policy along with the date you wish for it to go in force. We will contact you to arrange for the down payment and payment options.

If you are not interested in purchasing please let us know this as well so we can update our records. As we are always trying to strive to be more competitive for our clients can you please provide some feedback? Was it price, was our service not up to your standards? Your feedback is extremely important to us.

Once again thank you for allowing us the opportunity to earn your business.

A referral is the best compliment that you can give us

Sincerely,



Agency Intelligence



Sales & Retention



Advanced



Open



Save



Print



Refresh



Tutorial



Sales & Retention X

Sales Pipeline

▼ Lead	7
Unqualified	2
Qualified	5
▼ Prospect	360
Discovery - Purchase	2
Discovery - Renewal	1
Discovery - Shopping	8
Discovery - Commercial Only	54
Discovery - More Info Needed	14
Discovery - Future	36
Submission	17
Quote	4
Proposal	190
Sold Pending	29

Policies with Status 'Prospect: Sold Pending'

[What's this?](#)

Group By

Application Type ▼

Search By

Effective Date ▼

Date Range

Next 120 Days ▼

Application Type	November 2018	December 2018	January 2019	February 2019	March 2019	
Personal	9	4	0	1	0	
Commercial	1	2	2	0	0	

Very good sub-status to ensure Account Managers don't lose track of a customer's commitment to buy and helps management track new sales along with renewals to get a pulse of monthly revenue.

File Edit View



Agency Intelligence



Sales & Retention



Advanced



Open



Save



Print



Refresh



Tutorial

Agency Intelligence

Sales & Retention

Sales Pipeline

▼ Lead	21
Unqualified	19
Qualified	2
(No Sub-Status)	0
▼ Prospect	463
Discovery-Shopping	36
Discovery-Need more Info	10
Discovery-New Purchase	1
Discovery-Renewal	1
Discovery-Commercial	0
Submission	5
Quote-Received	0
Proposal Sent to Ins	31
Sold Pending	4
(All Others)	375
▶ Refused	58
▶ Rejected	9

Policies with Status 'Prospect: Sold Pending'

[What's this?](#)

Group By Search By Date Range

Application Type	March 2019	April 2019	May 2019
Commercial	1	1	0
Personal	2	0	0

Very good sub-status to ensure Account Managers don't lose track of prospect's commitment to buy and helps management track new sales along with renewals to get a pulse of monthly revenue.

Sales Pipeline

▼ Lead	7
Unqualified	2
Qualified	5
▼ Prospect	360
Discovery - Purchase	2
Discovery - Renewal	1
Discovery - Shopping	8
Discovery - Commercial Only	54
Discovery - More Info Needed	14
Discovery - Future	36
Submission	17
Quote	4
Proposal	190
Sold Pending	29
Realtor / Lender	4
(All Others)	1
▼ Refused	9,450
Price	380
Didn't Buy Risk	295
No Contact	256
Add Info Not Provided	43

Policies with Status 'Refused: Price'

[What's this?](#)

Group By

Application Type ▼

Search By

Effective Date ▼

Date Range

Next 120



Application Type	November 2018	December 2018	January 2019	February 2019	March 2019	
Personal	3	6	24	9	0	
Commercial	1	0	0	0	1	

Tahoma
2
A A T B I U
A A

Dear <<Cli_FirstNames:PC>>,

We hope this email finds you well.

It has been a year since we have quoted your <<Pol_LOBDescriptions>> insurance. We are taking this opportunity to let you know that we've worked very hard over this past year to obtain better carriers and are writing policies that are 10-25% cheaper than we did before. We are very excited about the potential savings we can offer you and would like another opportunity to earn your trust and your business.

If you would like another <<Pol_LOBDescriptions>> quote, please reply to this email and we will call you within 1 business day to get started.

Sincerely,

Totals (Count = 2)

4

6

24


9


1


Refusals Don't Have to be a Complete Loss:


Price


File Edit View


 Agency Intelligence


 Sales & Retention


 Advanced


 Open


 Save

 Print

 Refresh

 Tutorial

 Agency Intelligence

 Sales & Retention

Sales Pipeline

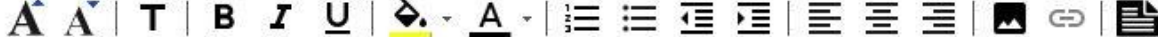
▼ Lead	21
Unqualified	19
Qualified	2
(No Sub-Status)	0
► Prospect	463
▼ Refused	58
Price	30
Didn't Buy Risk	9
No Contact	2
Will Not need	10
Add Info not Provided	0
(No Sub-Status)	7
▼ Rejected	9
U/W Rejected	5
Agency Disqualified	2
Could not compete	1
(No Sub-Status)	1

Policies with Status 'Refused: Price'

Group By Producer Search By Status Date Date Range All Dates

Producer	Price
Dirk M Zeigler (DMZ)	29

Arial 2



Dear<< Cli_FirstNames:PC>>,

It's been a while since we last spoke.

We sent you a quote almost a year ago quoting your <<Pol_LOBDescriptions>> insurance. We wanted to let you know that over the past year we have worked very hard to bring on new insurance carriers that allow for us to quote better pricing/coverages.

We are excited to share this with you and would like to see if you would allow us another opportunity to earn your business.

If you are interested in us quoting your <<Pol_LOBDescriptions>> insurance, please reply back to us and we can reach out to you to ensure we have the most updated/accurate information.

We look forward to speaking to you soon.

Sincerely,

<<User Name>>

Rejections Can Build TRUST:

Could Not Compete



Agency Intelligence



Sales & Retention



Advanced



Open



Save



Print



Refresh



Tutorial



Agency Intelligence



Total Active Policy Annualized Premium by Company (87 records)



Program Summary of Total Active Policy Annualized Premium by Company (87 records)

Sales Pipeline

▼ Lead	7
Unqualified	2
Qualified	5
► Prospect	362
▼ Refused	9,456
Price	381
Didn't Buy Risk	297
No Contact	256
Add Info Not Provided	43
(No Sub-Status)	8,479
▼ Rejected	52
U/W Rejected	39
Agency Disqualified	5
Could Not Compete	3

Policies with Status 'Rejected: Could Not Compete'

[What's this?](#)

Group By Search By Date Range by

Application Type

Application Type	Could Not Compete
Commercial	3

File Edit Format Insert Tools View Help



Save



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Subject: BEACON INSURANCE COMPLETED A REVIEW OF YOUR COVERAGE

☐ Request Read Receipt

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Dear <<Cli_FirstNames:PC>>,

First and foremost, thank you for the opportunity to quote your <<Pol_Title>> insurance coverage for <<Cli_BusName>>.

We have shopped every market that we have at our disposal and have come to the conclusion that your current policy is better than anything we have available to offer. The current rate you have is lower than any of our carriers.

Unfortunately, we have to tell this to other customers other than you periodically, however, we feel that our integrity about ensuring you have the best coverage at the best rate is far more important than trying to lure you away from your current insurance provider solely for the purpose of growing our business. That has never been our style.

We appreciate the trust you have placed in us to work on your account and learn more about the business owners you are. We are continuously partnering with new commercial insurance providers and would love the opportunity to quote you in the future.

Keep the Business You've Already Earned:

Renewal Reports

- PL – look 45-60 days out
- CL – look 90-120 days out
- Sort by month / week
- Rack report on Expiration Dates
 - Add bill type
 - Sort by LOB
 - Batch email LOB/Bill Type accordingly

Order of Operation

- Get your sales & retention statuses and sub-statuses organized
- Decide how to use any and all statuses / sub-statuses
- Formulate internal processes and procedures with account managers
- Build necessary correspondence templates in CMS
- Learn how to prioritize sales pipelines and train as necessary
- ATTACK!

QUESTIONS??

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dirk@zeiglerinsurance.com