engagex
CUSTOMER ENGAGEMENT SOLUTIONS

Your Road Map to Customer Insurance Reviews

Start

Several Weeks Before Meeting

- Contact Customer to Setup Appointment

Immediately After Appointment Setup

Send a Needs Assessment Form

Immediately After Appointment Setup

Create Working File for the Customer

- Agent Activity Checklist
- Needs Assessment
- Customer Insurance Review Worksheet

1 Week Before Meeting

Meeting Preperation

- Review Needs Assessment
- Note Current Coverages

3 Days Before

Reminder Call

Conduct the Review

- Identify Coverage to Update
- Review for Potential Discounts
- Ask for Referrals

Immediately After Meeting

Complete Action Items

1 Week After Meeting

Follow Up On Action Items

- Invite Questions
- Provide a Quote for Additional Coverage
- Review Completed Action Items
- Remind About Meeting Next Year

Client Experiences Life Changes

1 Year After Meeting