engagex
agencyTHRIVE program

Customer Insurance Review Checklist

Set Appointment with customer ☐

Appointment Date Time Location

Prepare for Customer Insurance Review

- Send Needs Assessment Worksheet to customer ☐
- Create working file ☐
- Add current coverages to Customer Insurance Review Worksheet ☐
- After customer completes Needs Assessment Worksheet, add notes to CIR Worksheet ☐
- Make reminder call about the appointment ☐

During the meeting

- Update contact information ☐
- Collect/update emergency contact ☐
- For each section: Educate\Review\Ask ☐
- Note all maintenance items for follow up ☐
- Uncover new product lines the customer may be interested and note them for follow up ☐
- Do not write any new policies during the meeting ☐
- Review portfolio for potential discounts ☐
- Ask for referrals ☐

Follow Up

- Update your customer's file with any information you uncovered during the review ☐
- Complete any action items or tasks you identified ☐
- Send your client any educational information or policy details you may have suggested along with a copy of the completed CIR worksheet ☐
- Call your client 1 week after the meeting to review information you sent and provide quotes where necessary ☐
- Remind your client that you will be calling in 12 months for another meeting ☐
- Set calendar reminders for action items more than 1 week out ☐