



Prospective Agent Information

Agency Legal Registered Name:		Agency Tax ID#	Area Code + Tel. #	FAX #
Mail Address:			Mail Zip:	
Location: (if different from mailing address)			Loc. Zip:	
City:		State:	County:	
Agency Contact:	Agency Contact Title:	Agency Contact Email Address:	Agency Website(URL)	
Business Structure: <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation				

Agency Automation: Please provide the following information. If no answer, please type none.

Agency Mgmt System (i.e. Applied, AMS, Etc.)	Vendor Version:	Comparative Rater (i.e. EZLynx, Setwrite, etc.)	Vendor Version:
Choicepoint J Node:			

Do You Want Download?	Ivans Acct. # :	Download contact Name:	Download contact Email:	Download contact phone:
Transaction Filing? YES <input type="checkbox"/> NO <input type="checkbox"/>	Transformation Station? (Applied) YES <input type="checkbox"/> NO <input type="checkbox"/>	Get Real-Time?	Transact Now? (AMS)	

KEY PERSONNEL DATA: List Agency Principals and all Personal Lines Managers, Supervisors, and CSRs:

Name:	Title/Position:	Soc. Sec. # & D.O.B.	Yrs. Exp?	%Time PL?
Name:				%
Name:				%
Name:				%
Name:				%
Name:				%
Name:				%
Name:				%
Name:				%

Agency Staffing & Revenues:

Total # of agency employees:	PL Commission Revenue: \$	% Change from last year	PL Growth Goal%
Total # of PL employees:	Total # of PL CSRs:		
Total # of PL Customers/Insureds (Not Policies)	Total # of PL Producers:		
% of PL Customers with both Auto/HO	Total # of PL policies:	Current PL Client Retention %	

Carriers in Your Agency: Prior Year End Written Premium (WP)

Top 5 Carriers:	Direct Contract or thru MGA?	PL WP (\$)	Auto WP(\$)	*Auto Loss Ratio%	Home WP (\$)	*Home Loss Ratio %
Totals:						

***Attach actual company results for the last 3 years**

Flood Carrier Name	Flood ID:	Flood Written Premium	Commission %	Boat/Yacht Carrier	Total WP Boat/Yacht	# of Customers Boat/Yacht

Please provide the following information. If no answer, please type none	Personal Lines %
% of customers serviced by a company service center?	
% of transactions via upload/download?	
% of accounts paying by EFT or credit card?	
% of claims reported directly to carrier?	

Do you currently track your Source to Sale? ____ Yes/No

Do you track clients quoted as well as Sales? ____ Yes/No

Do you track lost business? ____ Yes/No How do you track? _____

If yes, how many do you lose on average per month? _____

How many Auto quotes do you average monthly? _____

How much Auto new business do you average monthly? _____

How many Homeowner quotes do you average monthly? _____

How much Homeowners new business do you average monthly? ____

What are your best sources of new business for the agency? _____

How does your agency generate leads?

____ Advertising ____ Direct Mail ____ Sponsorships ____ Speaking Engagements ____ Community Events

____ Other – please explain _____

What area do you market? This city only or surrounding areas as well? Please explain

Do you solicit all personal lines of insurance, i.e. Flood, Valuable Items, Umbrella and Boat? ____ Yes/NO

Does the agency use an incentive program with producers or CSR's?

____ Yes/No If Yes, please explain _____

Does the agency have a written business or marketing plan? ____ Yes/No If yes, please attach.

Does the agency have a perpetuation plan? ____ Yes/No

Is agency currently dealing with an extraordinary service constraint? ____ Yes/No

If yes – please explain _____