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| --- | --- | --- | --- |
| **New Insurance Client Checklist** | | | |
|  | **Step** | **Activity** | **Person Responsible** |
| **Pre-Appointment** | 0 | Set up name, contact info & code as “INS Prospect” on CRM |  |
| 1 | Send Thank You Card to Referrer |  |
| 2 | Send Email #1 Template – Warm Touch to set up next call |  |
| 3 | Call to Set Initial Meeting |  |
| 4 | Initial Meeting Email Confirmation w/ Map & Parking Info |  |
| 5 | Confirmation Call |  |
| If there is general interest, continue: | | | |
|  | 6 | **MEETING 1 – Is There a FIT?** |  |
| **The FIT Meeting** | 7 | Run Initial Numbers (Birthday, Smoker Status, Financial Needs Analysis) | Third Party |
| 8 | **Make the “Is there a FIT Call”**  If not a FIT, the process ends here.  Is there IS a FIT Call based on initial numbers:  **Complex:** Call to set up 2nd Meeting - Insurance Options  **Simple:** Call to set up Email with Insurance Options and follow up as appropriate |  |
| If there is an initial FIT, continue: | | | |
| **Insurance Options Meeting** | 9 | Confirmation Call |  |
| 10 | **MEETING 2 - INSURANCE OPTIONS** |  |
| 11 | If agreement to proceed, submit the Completed Application | Third Party |
| 12 | Send Meeting Follow Up Email along with Next Steps |  |
| 13 | Ensure Medical Underwriting is Complete | Third Party |
| 14 | **Approved via Medical, Carriers Approval & Policy Delivery** | Third Party |
| If there is a solid FIT and Policy is fulfilled, continue: | | | |
| **Policy Delivery** | 15 | Complex Policy - Call to set up Policy Delivery Meeting  Simple Policy – Email/Mail the Policy to Client |  |
| 16 | Confirmation Call |  |
| 17 | **MEETING 3 - POLICY DELIVERY** |  |
| 18 | Ensure Premium is Paid by New Client |  |

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| --- | --- | --- | --- |
| Congratulations – You have a new insurance client! | | | |
| **New Client Welcome** | 19 | ADMIN SET UP ON THE CRM:  Classify as “Client” & add your name as “Insurance Advisor”  Complete all related Insurance Fields for the client  Activate the INS Service Model Activities (Renewals)  Trigger additional follow ups specifically to this client |  |
| 20 | Send New Insurance Client Welcome Card & Gift |  |
| 21 | Follow Up & Care Call |  |