Renewal Review Call Prep

AGENCY STANDARDS	
% Rate Increase Flag:	EPLI Coverage:
Cyber Liability Coverage:	Agency Name:

PRE-CALL CHECKLIST - *Complete details before the call*		
Client Name:	Agent Name:	Date:

Contact Information for Insureds:

Name	Cell	E-mail	DOB	DL#	Occupation	Notes

☐ Check task activities, important notes and download:

☐ Check Claims:

Policy	Last Term Premium	This Term Premium	% Rate Change	Payment Type
	$	$	0 %	
	$	$	0 %	
	$	$	0 %	
	$	$	0 %	
Total:	$ 0	$ 0	$ 0	

FEIN:

☐ Yes ☐ No

If in E&S is it eligible for the admitted market?

☐ Yes ☐ No

Personal lines with the agency:

☐ Yes ☐ No

Other businesses insured with agency?

☐ Yes ☐ No

Group benefits with the agency?

☐ Yes ☐ No If yes, check MG System relationship is set up

Life insurance with the agency?

☐ Yes ☐ No

	Inland Marine	General Liability	Property	Cyber Liability	EPLI
Deductible					
Liability					
Limits					

FARM COVERAGE

Property	Liability	Deductibles	Roof	Water Sewer	Service Line	Alarm	Scheduled Items

Cattle coverage:

Farm buildings (size and type):

Farm Equipment:

Total Acreage:

Hay/Feed:

Farm Labor:

Umbrella: ☐ Yes ☐ No

NOTES

MAKE THE CALL

CALL RESULTS

VOICEMAIL *(Remember use professional voice)*

Hello, this is____from ____. I am the insurance agent on for your **POLICY TYPES** with **COMPANY Name** and wanted to let you know that I was reviewing your insurance policy and had a few items I wanted to go over with you, this week. Please call me between **8:30 and 5:30**, this week or email me a time that works to contact you, I can review your options with you. Thank you for your business!

- [ ] Sent Email
- [ ] Sent Text
- [ ] Documented Call (See last page for guidelines on how to document the call)
- [ ] Sent Bad Contact Letter

CALLED BACK *OR* CALL CONNECTED

- [ ] **Introduction & Rapport: Introduce yourself as their agent** - *"Good Morning Mrs. Last Name. This is ____, your insurance agent from ____________________________________ Insurance Agency. I hope you are well today."*

- [ ] **State the reason for your call** - *"I'm calling because your policy name with company name is coming up for renewal and we wanted to make sure we have all the most up-to-date information for your protection and to maximize your discounts."*

- [ ] **Obtain updated contact information** - "Ok, let's get started. I only need a few minutes. Is this the *best number* to reach you? Is this the *best email address* for you? Can you confirm this is *your mailing address*? In the event we need to reach you, what's the best secondary phone number and email address?" **(Hint: don't ask for the information; instead recite what you have on file and ask them to confirm it!)**

Name	Cell	E-mail	DOB	DL#	Occupation

NOTES

REVIEW

Deductible - *"If you had a loss, what is the highest deductible you would be comfortable with?"*

Any updates to the home?

Cattle coverage:

Updates:

Farm buildings (size and type):

Updates:

Farm Equipment:

Updates:

Total Acreage:

Updates:

Hay/Feed:

Updates:

Farm Labor:

Updates:

Recommendations

It looks like we can move you into a standard market what this means is you can generally get better coverage and savings. With these updates I am going to review those options for you next.

1. Check Relationship first to see if we have personal lines. May one of our personal insurance specialist contact you?
   ☐ Yes ☐ No

2. Do you currently have life insurance?

☐ Yes ☐ No

3. Do you currently offer group benefits to your team? If so we can have our benefits specialist call you.

☐ Yes ☐ No

Policy	Last Term Premium	This Term Premium	% Rate Change	Payment Type
	$	$	0 %	
	$	$	0 %	
	$	$	0 %	
	$	$	0 %	
Total:	$ 0	$ 0	$ 0	

☐ **Next Steps**: *Confirm the date and time you will be back in touch with any of the following – remember we should set an appointment with them:*

- Changes: ____________ Notes: ____________
- Cross Selling Quotes: ____________ Notes: ____________
- Remarkets: ____________ Notes: ____________

List any personal details gathered (pets names, kids names, vacation spots, hobbies) this will make future calls more personal!

☐ **Thank them for their business:** *"I want to let you know how much we appreciate your business. We know you have insurance choices, so if you ever need anything be sure to call us first so we can take care of you."*

☐ **Referral:** *"We love helping people just like you, if you know anyone who needs help with their insurance please have them call me."*

DOCUMENTATION

Document Call in Management System ☐

Total Increases: ____________

Total Cross Sell Opportunities: ____________

MANAGEMENT SYSTEM

QQCatalyst, AMS360, Hawksoft, Ezlynx & Other

Account Review	Used to close out the suspense that initiated the Account Review
Account Review Attempt	Attach your Call Sheet to this activity, you would use this if the client does not answer and you leave a message. Then send the appropriate Retention Email.
Account Review Bad Contact	Attach your Call Sheet to this activity, you would use this if the client's number has been disconnected or the number in file is incorrect. Then send the Bad Contact Letter in the mail and add a "tag" to the account that updated contact information is needed.
Account Review Contacted	Use this when you get the client live on the phone. Use this activity to create a suspense of any other items you need to follow up on.
Account Review Completed	Use this when you have completed any follow up items that may have been needed from an account review that was contacted or called back.
Account Review Call Back	Use this code to document the notes from a client who returned your renewal review call. Use this activity to create a suspense of any other items you need to follow up on.
Increase	Use this code when you increase coverage
Remarket Quote	Use this when you quote a remarket. Attach the quote to this activity.
Remarketing Success	Use this when you get a signed app on a remarket. Attach the new signed app to this activity.
Account Round Quote	Use this when you quote an account round. Attach the quote to this activity.
Account Round Success	Use this when you get a signed app on an account round. Attach the new signed app to this activity.
**Previous Reviewed All <10 months	Use this when you have already successfully completed an account review less than 10 months ago.

As it is difficult in HawkSoft to track the number of Renewals that are assigned to a person without auditing the daily download log or running renewal reports it easier to use **Account Review as the Activity Code for an Account Review unless the account has already been reviewed within the last 10 months in which case it would be logged as **Previous Reviewed All <10 months.

Epic & TAM

Account Review	Successful	Account Review Call made and the person was contacted
Account Review	Unsuccessful	Attach your Call Sheet to this activity, you would use this if the client does not answer and you leave a message. Then send the appropriate Retention Email.
Account Review	Unsuccessful-Bad Contact	Attach your Call Sheet to this activity, you would use this if the client's number has been disconnected or the number in file is incorrect. Then send the Bad Contact Letter in the mail and add a "tag" to the account that updated contact information is needed.
Increase	Successful	Use this code when you increase coverage
Increase	Unsuccessful	Use this code when you recommend coverage and the client declines it
Remarket	Successful	Use this when you get a signed app on a remarket. Attach the new signed app to this activity.
Remarket	Unsuccessful	Use this when you remarket an account but they stay with the current carrier
Account Round	Successful	Use this when you get a signed app on an account round. Attach the new signed app to this activity.
Account Round Success	Unsuccessful	Use this when you quote an account round but they don't move forward with the quote
**Previous Reviewed All <10 months		Use this when you have already successfully completed an account review less than 10 months ago.