

HIG Sales Process

1. Collect info (name, email, phone #, and dec pages & add to EZlynx) let the insured know we will notify them when the quote is ready and will be sent, if they are out of town, it will be a quote video, in town, the option of in office
 - a. If ELP automatically will be in PD
 - b. Get to Rater Page in EZ
2. Assign "to be quoted" to Agent in PD (Elp's) or Email
3. Agent Finalize quote (48 hours)
4. Agent prepare quote (quote vid or appt in office) and email to the prospect
5. Turn back over to Sales Assistant for FU's
FU in 3 days
FU 1 a week after 3 days
FU Weekly after 1st week for 4 weeks
FU Monthly until bound or no go
6. Make sure to add to HIG 2019 Report
 - a. Update in Customer Since, Nickname, Assigned User, email and ALL info added in EZ
7. Annual checkup via Rocket Referrals report
https://app.rocketreferrals.com/company_lists/22955/contacts
 - a. Update info (email)
 - b. Asked to send review requests to email (if haven't already)
 - c. Any other insurance needs they have been thinking about?