

Inspire a Nation Business Mentoring (A Williams Family Investment Group Company)  
Fix My Insurance Agency Assembly Line Questionnaire

**Agency Name**

**Agency Address (City, State, Zip)**

**Principal Agent(s) Name**

**First Name**

**Last Name**

**Best Contact Information**

**Mobile**

**Email**

**Agency Operations Manager**

**First Name**

**Last Name**

**Best Contact Information**

**Mobile**

**Email**

**AGENCY LEAD TO CLOSE AND QUOTE TO CLOSE RATIO BY TOP 3 PRODUCTS**

**Product One**

Lead to Close %

Quote to Close %

**Product Two**

Lead to Close %

Quote to Close %

**Product Three**

Lead to Close %

Quote to Close %

**AGENCY PREMIUM AND REVENUE PER SALE BY TOP THREE PRODUCTS**

**Product One**

Avg Premium/Sale

Avg Revenue/Sale

**Product Two**

Avg Premium/Sale

Avg Revenue/Sale

**Product Three**

Avg Premium/Sale

Avg Revenue/Sale

**AGENCY CARRIERS**

**Top 3 Carriers by Overall Revenue?**

**Carrier Name**  **Revenue \$**

**Carrier Name**  **Revenue \$**

**Carrier Name**  **Revenue \$**

**Top 3 Carriers by Overall Premium?**

**Carrier Name**  **Premium \$**

**Carrier Name**  **Premium \$**

**Carrier Name**  **Premium \$**

**Top 3 Carriers by Policy Count and Policy Type**

Carrier Name  Count  Type

Carrier Name  Count  Type

Carrier Name  Count  Type

**Recommended Carrier Niche/Product? (What the carriers want the agency to write)**

Carrier Name  Niche/Product

Carrier Name  Niche/Product

Carrier Name  Niche/Product

## MARKETING

Top 2 Marketing Campaigns to Reach the 5 Best Prospects

### Current Customers

Campaign 1

Campaign 2

### Business Referral Partners

Campaign 1

Campaign 2

### Prospects Actively Interested in the Agency's Products and/or Services?

Campaign 1

Campaign 2

### Former Customers

Campaign 1

Campaign 2

### Prospects with a Possible Upcoming Need for the Agency's Products and/or Services

Campaign 1

Campaign 2

**CORE AGENCY TECHNOLOGY TOOLS BY VENDOR**

1. Agency Management System

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2. Electronic Business Card Vendor

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3. Email Tool(s) Vendor

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4. Trigger Based Drip Emails

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5. Text Message Tool

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6. Electronic Declined Coverage Form

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7. Online Appointment Scheduling Tool

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8. Link Shortening Service

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9. Electronic Signature Tool

10. Video Recording Software for Desktop, Mobile, or Tablet

11. Password Management Tool or Service