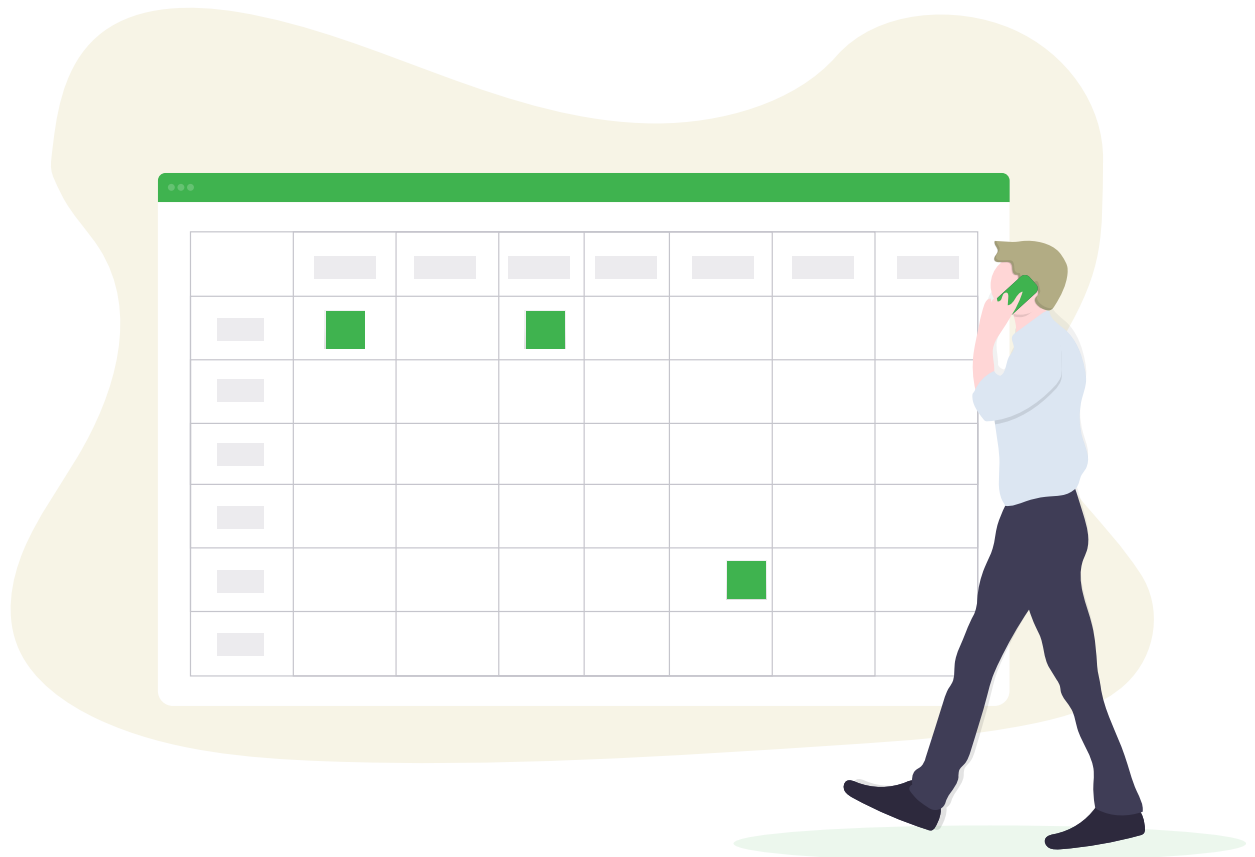




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Agent Pivot Sheet



Keep the conversation going and the policies coming.

Insurance policies aren't static. Your customers' needs will change over time and your agency should be prepared to help secure coverage for whatever life throws their way. By regularly checking in with policyholders, you can help customers plan for the future while earning more business for your agency.

On the next page, you'll find an example of a pivot sheet your team can use to track conversations they have with customers. Not only will this help agents organize their customer communications—it'll also keep them accountable to their sales goals.

Send this PDF to your agents or pass printed pivot sheets around to your team to achieve more wins for your office.

Pivot Sheet

Team Member _____ Quotes _____

Health Quotes			
Customer Name	Date Quoted	Product	Quoted Results
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Life Quotes			
Customer Name	Date Quoted	Product	Quoted Results
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			





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