



Let's Get Acquainted

Company Name _____
Name _____

Office # _____

Our Client Specialists are committed to helping you develop new growth through excellent business relationships with your clients and new prospects. Please complete the following questionnaire to assist them.

1. What is your agency's specialty? (commercial, personal lines, health, retirement, etc.)

2. How many companies do you represent and what are some of the top ones?

3. What is the area like where you work?

4. What sets you apart from other agencies in your area?

5. Do you prefer Meet-n-Greets or Formal Appointments? (We will try to set per your request)

a. Meet-n-Greets (agent stops by to meet prospect and hands out packet of information) Is there a day of the week you would prefer ?

b. Formal Appointments (Which day of the week do you prefer – is there a specific time slot?)

6. Do you have any additional comments? _____