

PRE-APPROVAL FOR EXISTING CLIENTS

When You Find Out They're An Existing Client:

"Glad to hear you have us! I want to make sure you are being taken care of. When's the last time you have seen your agent?"

IF they say they just saw their Agent - "Great! Glad to hear you are taken care of!"

- Time to ask for referrals and work with the business/coworkers! They already like our plans!

IF they say it's been a long time - "Great! That's exactly what I'm here for. Do you remember who your agent is and what policies you have?"

IF you/they aren't sure who their Agent is - "A lot of people remember they bought something but aren't sure what it covers so that's normal! I'll call in after this and make sure I get all the right info and swing back sometime this afternoon or tomorrow. We might even owe you some money! Does that work?" *(or schedule an appointment)*

What To Do:

IF they are an ACTIVE Agent

- Must ask for approval from the Original Agent before reservicing them.
- Split commission with original agent

IF they are a TERMED Agent

- Must ask approval from the AO if they are still active.
- Split Commission with original AO

IF they don't have an Agent and AO is no longer here

- No approval needed
- No split needed

Information Needed For Pre-Approval:

[Click here to complete the Outside Agency Pre-Approval Form with the below information](#)

- Original Agency Owner
- Requesting Agent
- Original Agent
- Client Name
- Client Location
- Coverage
- Coverage Effective Date