



Onboarding Appointment Checklist

Before Onboarding Call

- Send Reminder:** Send a reminder email and text with the Zoom link 15 minutes before the scheduled meeting.
- Review Notes:** Review the sale wrap-up notes from the sales producer to learn more about the new client.
- Verify Billing:** Verify the status of their account billing – confirm the first payment has been made. If it's going through escrow, ensure it's set up for mortgagee payment.
- Contingencies:** Ensure all contingencies are met and make a note of any outstanding requirements.
- Inspection:** For homeowners policies, check if a home inspection is necessary.

During Onboarding Call

- Thank Them & Recap Agenda:** Start by enthusiastically thanking them for choosing your agency for their insurance needs, and briefly cover the agenda for the call.
- Contingencies:** Collect any outstanding documents they need to provide, such as address verification or proof of prior insurance. Collect these documents during the call, not after.
- Signing Required Documents:** Guide them through signing necessary documents, make sure they complete this before the call ends.
- Home Inspection:** When applicable, explain the home inspection process for their homeowners policy.
- Recreational Vehicles:** Ask if they have any specialty items, like an RV, trailer, or motorcycle.
- Review Coverages:** Discuss the details of their coverage for the policies they now have with your agency.
- Commercial Insurance:** Ask about their Commercial insurance needs, using the **Service Calls & Onboarding Appointment Scripts**.
- Life Insurance/Medicare:** Ask about their Life Insurance/Medicare needs, using the **Service Calls & Onboarding Appointment Scripts**.
- Google Review:** Ask for feedback on their experience with their producer and request a Google review. Send them the review link and have them click the link to make sure it works.
- Referrals:** Conclude by asking for any referrals they might have.