Preparing For Appts. & After The Sale

Here are some very important things to remember when preparing for appointments and some good common practices after the sale.

Preparing For Appts.

* Most E-apps will work much better with a laptop or an I-pad. Not very many tablets are compatible with E-apps.

* Even though most carriers have E-apps, always have paper apps as back up. And always prepare for your appointments the day before.

* Once you are contracted with the carriers, you can call their marketing department and ask them to send you supplies by email and regular mail.

* Make sure that you have your agent numbers and login credentials for the carriers websites so you can access their E-apps.

* If you are planning on writing some E-apps for **AIG**, you need to call them and ask for the Agency Code - you will need this to access their website and use their E-app.

* You will need to have internet access to use the E-apps. So make sure you have a hot spot or WIFI device setup and ready to go.

After The Sale

* Always tell the clients that you will be calling them a few times over the next several days to keep them updated on the status of their application.

* Keeping your clients updated of the status of their application will greatly help reduce the amount of cancellations and chargebacks.

* Once your clients policy has been approved, make sure to call them and congratulate them for getting approved. And also tell them that you are available to come by and go over their policy with them if they have any questions.

* Always make sure that your client remembers when their Initial Draft is going to be coming out of their bank account.

* It's always important to check your pending business every morning on the carriers websites so you know what's going on with your policies.