

Daily Agency Planner

InsuranceAgentForms.com

Date _____ Producer / CSR _____

THE THREE THAT HAVE TO HAPPEN TODAY

☐	_____
☐	_____
☐	_____

QUOTES OUT — FOLLOW UP

quoted 2+ days ago?

CLIENT	LINE	CARRIER	FOLLOW UP BY
☐	_____	_____	_____
☐	_____	_____	_____
☐	_____	_____	_____
☐	_____	_____	_____
☐	_____	_____	_____
☐	_____	_____	_____

RENEWALS & X-DATES

30 / 60 / 90 out

CLIENT	X-DATE	REMARKETING?	CALLED
☐	_____	_____	_____
☐	_____	_____	_____
☐	_____	_____	_____
☐	_____	_____	_____
☐	_____	_____	_____

SERVICE — COIS, ENDORSEMENTS, ID CARDS

CLIENT	WHAT THEY NEED	PROMISED BY
☐	_____	_____
☐	_____	_____
☐	_____	_____
☐	_____	_____
☐	_____	_____

PENDING CANCELLATIONS & PAYMENTS

the ones that lapse if nobody calls

CLIENT	POLICY	CANCELS ON
☐	_____	_____
☐	_____	_____
☐	_____	_____

CALLS TO MAKE BACK

NAME	NUMBER	ABOUT
☐	_____	_____
☐	_____	_____
☐	_____	_____
☐	_____	_____
☐	_____	_____

PUT IN WRITING TODAY

coverage declined, limits discussed, advice given

☐	_____
☐	_____
☐	_____

NOTES

