FREE 5-POINT CHECKLIST

5 gaps that could be costing your agency new business

A short self-check for independent insurance agencies and brokerages. Each gap explains a common inquiry-handling problem, gives you one question to ask and one action you can take.

How to use it: work through each gap with your team and answer the self-check honestly. This checklist is about handling the inquiries you already receive. It does not promise new business or any particular result.

1 Calls nobody answers

When the phone rings during a client meeting, at lunch or after hours, a caller may hang up without leaving a message. Some will try again. Others may contact the next agency they find.

SELF-CHECK

> **If someone called your main number right now, would they reach a person, a useful message or nothing at all?**

ACTION TO TAKE

Call your own number at a busy time and after hours this week. Note what a new caller hears and whether you could see that they called.

2 Website inquiries receiving slow responses

A website form can feel like a quiet inbox. If nobody is responsible for checking it, a new inquiry can wait hours or days for a reply.

SELF-CHECK

> **When your last website inquiry arrived, who saw it first, and how long did the first reply take?**

ACTION TO TAKE

Send a test inquiry through your own website form. Check where it lands, who is notified and whether the sender gets an acknowledgment.

3 No clear booking or callback option

Many people want to choose a time rather than wait for a call back. If the only option is “we will be in touch,” they may not know what happens next.

SELF-CHECK

> **Can a new prospect book a time or request a callback without phoning during business hours?**

ACTION TO TAKE

Add one simple next step to your website and voicemail message, such as a booking link or a callback request form.

4 Follow-up that stops too soon

A busy prospect may not reply to the first message. If follow-up depends on someone remembering, it can stop after one attempt. It should also stop when the person books, replies or asks you not to contact them.

SELF-CHECK

> **How many times does your agency follow up with a new inquiry that has not replied, and who decides when to stop?**

ACTION TO TAKE

Write a short, agreed follow-up sequence for new inquiries, with permission to contact and clear points where messages stop.

5 Leads with no owner or next action

Inquiries can sit in email, voicemail and notes with nobody clearly responsible. Without an owner and a next step, it is hard to know who needs a call today.

SELF-CHECK

> **Could your team list every open inquiry from the past two weeks, with who owns it and what happens next?**

ACTION TO TAKE

Choose one place to record each new inquiry, its owner and its next action. Review the list together once a week.

Fictional example

Lakeside Insurance Agency is a fictional, two-person agency used for illustration. On a busy Tuesday, a caller asks about home coverage while both staff are with clients. Nobody answers, so the caller fills in the website form instead. The form goes to a shared inbox that nobody checks until Thursday. Working through this checklist, the agency notices gaps 1, 2 and 5. It decides to add a callback request option, an automatic acknowledgment for form inquiries and a weekly review of open inquiries.

Want to see how these steps could work together for your agency?

Book my 20-minute demo

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