

# Peer Insurance Best Practices Group - Application

This is an application to the Insurance Agency Peer Group. The purpose of the Peer Group is to help Insurance Agencies tackle the tough issues associated with Agency growth.

Please answer all questions fully.

1. Please list the full name and address of your agency, and any DBA's or affiliates names:

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2. Please list the main address of all branch offices addresses:

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3. Are you now, or have you been in any best practice groups, and if so, please provide details of the group, what type of a group is it, and how often and when do you meet?

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4. Can you commit to attending two meeting per year, each meeting being two days in length and stay for the entire meeting session?  Yes, I will commit;  No, I cannot commit

5. What is the gross commissions of the agency (excluding contingencies)? \_\_\_\_\_

6. Provide percentage of revenue from each: Personal Lines \_\_\_\_\_ Commercial Lines \_\_\_\_\_

7. What are your annual premium writings by year?

Year-End 2019:  <\$10MM;  \$11-18MM;  19-26MM;  27-40MM;  > 40MM

Year-End 2020:  <\$10MM;  \$11-18MM;  19-26MM;  27-40MM;  > 40MM

Year-End 2021:  <\$10MM;  \$11-18MM;  19-26MM;  27-40MM;  > 40MM

**8. What has your growth been in the following lines of business for the following years?**

**01/01/2019 to 12/31/2019**

Personal Lines:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

Commercial Lines:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

Life & Health:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

**01/01/2020 to 12/31/2020**

Personal Lines:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

Commercial Lines:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

Life & Health:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

**01/01/2021 to 12/31/2021**

Personal Lines:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

Commercial Lines:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

Life & Health:  0-10%;  11-20%;  21-30%;  31-40%;  > 41%

**9. Do you have non-compete agreements for the following positions?**

Producers;  Client Service Reps;  Managers;  Owners; ;  Other Employees

**10. Please list the automations you have in place for each line of business. We are trying to understand want processes take place in your agency that occur without a human interaction.**

Personal Lines:

New business surveys/fact finders;  Renewal surveys/fact finders;

Periodic and specific coverage offerings base on client's current coverage;

Quoting process;  Video proposals;

Video proposals with interactive coverage selections;

Others – explain: \_\_\_\_\_

Commercial Lines:

New business surveys/fact finders;  Renewal surveys/fact finders;

Periodic and specific coverage offerings base on client's current coverage;

Quoting process;  Video proposals;

Video proposals with interactive coverage selections;

Others – explain: \_\_\_\_\_

11. **What management systems do you use?**  AMS – platform/version \_\_\_\_\_  
 Applied Systems - platform/version;  Explain \_\_\_\_\_

12. **Do you a CRM for sales? Describe system & process** \_\_\_\_\_  
\_\_\_\_\_

13. **Do you have a marketing plan for new business? Explain** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. **Do you use any marketing firms and if so which firm and what do they do for your agency?**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

15. **Do you sell any niche products, and if so, please describe?** \_\_\_\_\_  
\_\_\_\_\_

16. **List specific areas of greatest needs in your agency for which you would like assistance**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

17. **Are you willing to you contribute to the group without reservation? For example: best practices, constructive feedback, participation in leadership, etc.**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

18. **Explain you agency's history (year formed, acquisitions, major growth years and why, etc.)**  
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\_\_\_\_\_  
\_\_\_\_\_

19. Please explain your agency's management structure

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20. Who are the agency principals and what is briefly provide some background on them

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21. Please list the name and phone number of the member who referred you

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22. Financial benchmarking is an important function of the group, are you willing to share your financials with your peers?  Yes;  No

23. Will you hold all discussion from the peer group in total confidence?  Yes;  No

X \_\_\_\_\_  
Applicant's Name

X \_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Date