

		Companies					
<b>Claims</b>	Timeliness						
	Fairness						
<b>Policy Issuance</b>	Timeliness						
	Accuracy						
<b>Products</b>	Variety						
	Quality						
	Pricing						
<b>Automation</b>	Direct Bill Facilities						
	Interface Capabilities						
	Agency Automation Resources						
<b>Underwriting</b>	Responsiveness						
	Consistency						
	Flexibility						
<b>Marketing</b>	Compatible Philosophy						
	Advertising Support						
	Professional Field Staff						
	Quality Agency Contract						
<b>Education</b>	Variety						
	Quality						
<b>Agency Management</b>	Variety						
	Quality						
<b>Accounting</b>	Premium Finance Plans						
	Account Payment Options						
<b>Commissions</b>	Basic						
	Excess						
	Contingencies						
<b>Other Production Incentives</b>	Financial Assistance						
	Producer Development Aid						
	Travel Prizes						
<b>Financial Position</b>	Strength						
	Stability						
<b>Management</b>	Responsiveness						
	Competitive Attitude						
	Flexibility						
	Support of Agency System						
<b>TOTAL</b>							

Track submissions, quotes and written policies by company, month and year. Use this form or preferably a spreadsheet.

Year: \_\_\_\_\_

		Companies						
January	Submissions							
	Quotes							
	Policies Written							
February	Submissions							
	Quotes							
	Policies Written							
March	Submissions							
	Quotes							
	Policies Written							
April	Submissions							
	Quotes							
	Policies Written							
May	Submissions							
	Quotes							
	Policies Written							
June	Submissions							
	Quotes							
	Policies Written							
July	Submissions							
	Quotes							
	Policies Written							
August	Submissions							
	Quotes							
	Policies Written							
September	Submissions							
	Quotes							
	Policies Written							
October	Submissions							
	Quotes							
	Policies Written							
November	Submissions							
	Quotes							
	Policies Written							
December	Submissions							
	Quotes							
	Policies Written							
TOTAL	Submissions							
	Quotes							
	Policies Written							